



# User's Manual

For Macintosh and Windows

Alexandria v5.4.4

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Printed February 14th, 2004—v5.4.4 Rev.D

Printed in the United States of America by

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# Introduction

Congratulations on selecting **Alexandria™ v5.4.4** as the information management system for your library. Alexandria is a powerful application that not only helps you manage your library collection, but also allows your patrons to fully access your library's resources.

Although Alexandria is simple to use, you'll learn its capabilities much faster by reviewing this user's manual, which is divided into chapters that correspond to the program's major areas.

To begin, the Alexandria library automation system consists of a main information server called the *Alexandria Data Station* (or Data Station for short) and various *clients* that communicate with the Data Station.

The Data Station is the central repository for all your Alexandria library system information; it stores all Alexandria data and performs the work required to process information and command requests from Alexandria clients. The first Alexandria program that you run (and enter registration information into) is your Data Station. There is only one Data Station for each Alexandria license.

The Data Station can perform all the functions of the **Alexandria Librarian™**, **Alexandria District Librarian™** and **Alexandria Researcher™** clients. You'll know it's the Data Station when you launch it because a window will appear and notify you. Inside the Alexandria folder is the **Data** folder, where all your crucial information (data) is saved.

Alexandria client computers communicate with the main Alexandria Data Station to perform library functions. Multiple clients can access the same Alexandria Data Station. Your Alexandria license determines which clients you can use and how many can be simultaneously connected.

Clients communicate with the Data Station using TCP/IP communications protocols. Alexandria v5.4.4 does not support Macintosh's AppleTalk protocol.

There are a variety of expanded Alexandria client programs that can access the data on your Data Station. Your license allows a fixed number of simultaneous users, no matter which client you are running. Your Data Station does not count as a client except on a "single user" license where no other clients are allowed. Depending on your license, clients are available for both Macintosh and Windows.

### Alexandria Clients

- **Alexandria Researcher** is used by patrons to access and search the library catalog. If authorized, it also allows patrons to place holds and reservations on items in the collection. **Alexandria Explorer** can be added as an option.
- **Alexandria Librarian** is used by the librarian to perform library functions such as circulation, cataloguing and all other administrative functions. Since Alexandria Librarian capabilities are contained in the Data Station, many libraries will choose to use the Data Station to perform these functions. You may use as many Alexandria Librarian clients as your license permits—but you will always only have *one* Data Station.
- **Alexandria Web™** is purchased as an Alexandria option. When activated on your Data Station, it allows the searching of your Alexandria collection using a standard World Wide Web browser such as America Online, Netscape Navigator, or Microsoft Internet Explorer.
- **Alexandria WAN** (wide-area network) allows you to access library collections on Data Stations connected through your network.
- **Alexandria Explore** provides a young child's interface to your Alexandria collection. The interface uses graphics and icons to help patrons who do not yet read proficiently find what they need in the collection.
- **Z39.50 Searching** allows users to search numerous collections simultaneously, enhancing research, reference, and much more. You can access public libraries, academic libraries, and other collections in an extremely user-friendly, built-in interface.
- **Z39.50 Server** is a built-in server, making it easy to share your own resources with others in your district or community. Patrons can access your data from community locations running Z39.50 clients. Alexandria Z39.50 capabilities give your patrons seamless access to data.
- **Alexandria District Librarian** provides access to multiple collections across a district using a wide-area network or to a centralized Alexandria database. With this workstation, a librarian can manage multiple libraries in a district.

### Alexandria Modules

- **SIF** ensures that K-12 instructional and administrative software applications work together more effectively. SIF is an industry-supported blueprint that enables diverse applications to interact and share data seamlessly; now and in the future. SIF reduces redundant data entry and allows data to be efficiently exchanged among different applications using a standard set of specifications.
- **SIP2** allows you to utilize SIP2 hardware (e.g. Checkpoint, 3M, etc.) by supporting the SIP2 protocol. Make your library more efficient with enhanced inventory and security features. Empower your patrons with self-service check in and out modes, allowing you more time to focus on patron information needs.
- **Advanced Bookings** provides valuable extensions to the reservation capabilities provided with Alexandria. This useful module streamlines the management of centralized media centers that process numerous requests each day.
- **NetLink** is COMPanion's collection of catalogued web sites in MARC/MARC 21 format. NetLink helps patrons find clearly organized and recognizable library information by increasing your collection with thousands of professionally catalogued web sites.
- **netTrekker**, unlike ordinary search engines, contains only academic-focused websites that are organized around K-12 curricula. A team of 400 educators and librarians evaluate websites for academic integrity and age appropriateness before they are considered for inclusion in net Trekker. Using netTrekker, students can safely search the internet for school projects and get high quality, contextual results, every time. netTrekker provides a complete K-12 academic search tool for your entire district with content customized for Elementary (K-5) or Secondary (6-12).
- **Sneak Peek** users will enjoy title reviews, summaries, and cover art all from within Alexandria's research interfaces. Hyperlinks connect patrons to this enhancement resource, displayed within your chosen web browser. Alexandria Sneak Peek offers a wealth of descriptive information and cover images relating to all types of books, from juvenile chapter books to conference proceedings. Various elements of content are added to update the information on a weekly basis. With Sneak Peek, you'll have access to more than 1.4 million ISBNs that have data elements associated with them.
- **SearchALL** accesses unlimited numbers and types of information sources, which may be searched simultaneously with a single user query and are displayed in one, organized results window. With Alexandria SearchALL, there's no need to submit and resubmit searches and sources. The sources SearchALL can access simultaneously include, but are not limited to, other library collections, search engines such as Google and Yahoo, databases like Ebsco and ProQuest, The Library of Congress, online encyclopedias and much more!
- **Fingerprint** is a biometric identification technology from the innovators at Sony. The Fingerprint module utilizes **Sony** hardware (i.e. Sony Puppy, FIU-600, etc.). No more remembering secret combinations or attackers guessing user passwords.
- **Alexandria Web Router** is an efficient and secure solution to manage the Web access and interface of multiple library collections. Web Router enables administrators to limit access to a single machine or IP address as the Web access point for multiple Data Stations.

## Special Note to Existing Alexandria Users

Due to changes in **Reservations**, **Preferences**, **Orders**, and other essential program areas, once an older Alexandria version data file has been imported or rebuilt into 5.4.4, it *cannot* be downgraded. Therefore, it is essential to archive and backup your data prior to installing the 5.4.4 upgrade. For more information on archiving and backup, please refer to the **Preparing for Alexandria** chapter, starting on page 7.

## Communication Protocols

Alexandria workstations always communicate with the Data Station using TCP/IP communications protocols. Alexandria does not support Macintosh's AppleTalk protocol.

**TCP/IP** (Transmission Control Protocol/Internet Protocol) is the protocol used for the Internet and is supported as part of the basic operating systems for both Macintosh and Windows.

## Where is My Alexandria Data Folder Located?

Your Alexandria **Data** folder is stored in your operating system's shared application support folder.

On Macintosh OSX machines, this folder is located in the following directory:

**Hard Drive > Users > Shared > Library > Application Support  
> Alexandria Support**

On a Windows machine, the shared application folder should be kept here:

**Hard Drive (*typically C:*) > Documents and Settings > All Users > Documents  
> Alexandria Support**

## Note and Warning Alerts

### - N O T E -

Look for a box like this for special notes or comments that should be carefully examined by the user.

### W A R N I N G !

Look for a box like this for warning messages or important comments that should not be ignored!

## Some Steps for Success With Alexandria

### Read Your Documentation

By reading this user's manual in its entirety, you will gain the insight required to run Alexandria, and thus, your library, more efficiently. You can also find this manual electronically on the installation CD or as a downloadable .pdf from our website: "[www.goalexandria.com](http://www.goalexandria.com)".

### Getting Trained

Our certified librarians can offer helpful insight and are able to train customers to use the most basic or the most advanced of Alexandria capabilities; you will gain a better understanding of how to use Alexandria and possibly a few helpful hints along the way. COMPanion offers several training options (i.e. internet, on-site, or in-house) to meet the needs of our customers.

### Check for Tech Notes and Tips of the Week

Using COMPanion's website, you may research several "tech notes" or "tips of the week" that offer step-by-step answers to questions on a variety of topics. Alexandria **Tech Notes** can be accessed by going to our internet website "[www.goalexandria.com](http://www.goalexandria.com)" and clicking on **Support**, then **Resources**. **Tips of the Week** can be found at the same web address under **Librarian's Corner**. New documents are constantly being added, so visit regularly and discover what's new.

### Join Alex Net and other COMPanion Listserv

AlexNet is a listeserv that allows you to share your questions and insight with other Alexandria users. You can also sign up to be informed of new product announcements as well as receive the **Tip of the Week** through email. You can subscribe from "[www.goalexandria.com](http://www.goalexandria.com)".



# Preparing for Alexandria

This chapter provides information about how to prepare for the automation of your library collection.

## Automating Your Library Overview

Use the following steps to prepare your library for automation with Alexandria.

- Step 1. Develop a secure backup strategy.
- Step 2. Determine a strategy for entering your item information.
- Step 3. Determine a strategy for entering your patron information.
- Step 4. Barcode your collection.
- Step 5. Install Alexandria.
- Step 6. Set your library preferences.
- Step 7. Add your item information.
- Step 8. Add your patron information.
- Step 9. Develop a machine-maintenance strategy.
- Step 10. Develop an Alexandria maintenance strategy.
- Step 11. Evaluate the security of your Data Station and situation requires.

## Archiving Your Data

Alexandria has a built-in archiving utility (see “*Archive Preferences*” on page 99) that can be configured to make complete, regular copies of your valuable Alexandria **Data** and store them in a folder on your hard disk.

The major difference between a backup and an archive is that backups are made on removable media that can be physically stored away from the library. Archiving provides a quick and automatic method of saving your database before you perform large changes (e.g. through importing, updates, utilities, or upgrades).

## Backing Up Your Data

Backups are duplicate copies of files on a computer that should be saved to an external source. You should have a backup strategy in place to ensure that you always have a current backup of your Alexandria data files.

**Daily backup of your Alexandria data is highly recommended!**

### What to Backup

Alexandria data files change every time you use the Alexandria system. For example, every time you update an item record or a patron, check an item in or out, or perform any other transaction in Alexandria, the data files change to reflect your updates.

All Alexandria information is stored in the **Data** folder. This makes it easy to backup your data on a regular basis.

### Why You Must Backup Your Data

Inevitably, sometime during the life of your computer, you will suffer hardware malfunction. When this happens, your data can be irreparably corrupted or lost. Although you can reinstall the Alexandria application from your original CD, doing so does not retrieve data files.

Your only options for recovering data when you have suffered a malfunction are to either re-enter all the data by hand or to recover your most recent data from a backup copy—and then update only the data that changed since the last backup was made. The more current the backup copy of the data, the less data you will have to re-enter.

All Alexandria data is stored in the **Data** folder, which makes it easy to backup your data on a regular basis. You should have a backup strategy in place to ensure that you always have a current backup of your Alexandria data files. With adequate backup procedures in place, only small amounts of information will be lost, even after the worst conceivable failure.

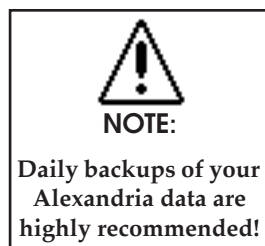
Your backup procedure for Alexandria should copy the **Data** folder. Some automation systems only backup your transactions on a daily basis. Although this technique results in a fast backup, it's not complete, and recovery can take much longer than a full backup.

If you make a backup copy of the **Data** folder at the end of every day, you'll be able to recover all the changes you've made through the end of each day. You can then recover the data easily and rapidly, should it be required.

For the purpose of backups, there are two kinds of files.

- **Program Files** are the files that make your applications run. These files are sent to you on disks or CDs, or downloaded from the internet, and you install them. In case of a failure in your system, you can reinstall these program files. For this reason, you are allowed to make *one* backup copy of the original disks or CDs to archive before storing both the original and backup copy in a safe place.
- **Data Files** are where your system information is stored. When you enter and change information using your applications such as Alexandria, Microsoft Excel, and ClarisWorks, your data files are updated. Because these files can change every time you use the application, and because losing all the data you have entered can be a major loss, you must make backup copies of your data on a regular basis.





## Determining a Backup Strategy

A backup strategy is a schedule for performing backups at regular intervals. It is highly recommended that you use the following guidelines in your backup strategy.

- Before using a new system, perform an initial backup to create a permanent archive of your data.
- **Backup your Data folder at the end of every day.**
- Make additional backups before and after you make any major changes in your system. For example, after you do an inventory and use **Utilities** to update your records at year-end, you should backup your data.
- To minimize data loss due to bad backup devices (such as damaged tape) avoid using the same tape, disk, or CD-RW for consecutive backups.
- Keep more than one backup copy of data and store copies off-location. This protects your data in case of fire or theft in the library. Some institutions will choose to take backup copies off location each week; others daily, and others monthly. The more recent the backup, the less information that will need to be reentered.
- Test your backup strategy and recovery procedures to make sure they work and that you know how to recover data. Do this *before* you have a problem so you'll know that you can recover data when needed.

## Backup Hardware

Although you can use any computer mass storage device for backups, the most reliable and cost-effective choices are tape (DAT, DLT, etc.) and removable media (Zip, Jaz, CD-R, CD-RW, etc.). COMPanion recommends that you **DO NOT** backup on any hard disks connected to your computer. For the best reliability, backup media should be stored *away* from your computer in case of theft, fire or other physical loss.

If you have a large amount of data, tape backup is the most reliable, cost-effective and efficient method. With tape drives, you can set backup procedures to run at a predetermined day and time without operator interaction. Modern tape drives hold several gigabytes of data on a single tape cartridge. If you have smaller amounts of data, removable media devices, such as COMPanion's Workstation Backup, provide ease of use and security.

Your choice of backup hardware will depend on your budget, the amount of data you need to backup, and the policies and procedures within your district or library.

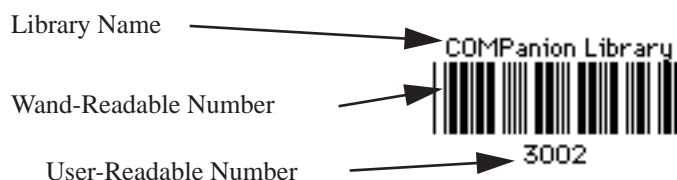
### Sample Backup Strategy

The following is a sample strategy for routine backup during normal operations. It requires a minimum of **eight** tapes or cartridges.

- Step 1. Label four tapes: Monday, Tuesday, Wednesday, and Thursday.
- Step 2. Label four additional tapes: Friday-1, Friday-2, Friday-3, and Friday-4.
- Step 3. Backup Monday through Thursday at the end of the day, using the assigned tape. Use the same tape for the same day of each week. For example, use the Monday tape every Monday, copying over last week's Monday backup with this week's Monday backup.
- Step 4. Backup Friday at the end of the day *using a new tape every Friday*. Use the tapes labeled Friday-1, Friday-2, and so on. Do *not* copy over the previous Friday's backup.
- Step 5. If you have more tapes or cartridges available, use these to keep more than four Friday backup tapes.
- Step 6. Store your Friday backup tapes or cartridges in a location other than the library. This guards against loss of data in case of fire or theft.

## Barcode Your Collection

Each item and patron in your library is assigned a unique number that Alexandria uses for identification. These numbers appear as barcode numbers on library items and patron library cards.



A typical barcode label consists of three pieces of information:

- The name of the library, school, or company
- The barcode, usually printed in the middle of the label
- The barcode number written in numerals at the bottom of the label

A barcode can be read quickly by powerful, low-cost scanning devices that you can purchase from COMPanion Corporation. Using a barcode reader makes your job easier and reduces the chance for errors. If you don't have a scanner, you can type the *user-readable number* in the command line.

The format of the barcode is called its *symbology*. The symbology COMPanion uses, Code 39 (also known as Code 3 of 9), is the industry standard for industrial and commercial applications—including libraries. This symbology provides a high level of data security with error rates between 1 in 3 million and 1 in 70 million characters scanned. Code 39 does not require a check character in normal commercial and industrial applications. It is also bi-directional, which means it can be scanned from left to right or from right to left.

You need barcode labels on all the items in your library that will be managed with Alexandria. You may also want to barcode objects such as audio-visual equipment, computers, desks, and tables, so you can use Alexandria to inventory these items.

You can also keep temporary records of items such as magazines and newspapers. Temporary items can be assigned a barcode number and then circulated like permanent items. A barcode number is assigned to a temporary item only while it's checked out.

## Guidelines for Choosing Barcode Numbers

You can set up barcode numbers (according to your needs) using up to fourteen digits. The following are general guidelines for determining your barcode numbering:

- Use the same number of digits for items and patrons.
- Consider using an employee ID or student number for patron barcodes (be sure employee IDs or student numbers do not coincide with item numbers).
- If you have more than one library in your system, use a unique barcode numbering scheme for each library's collection. This will make it easier to manage a central catalog with holdings from all libraries within the system. If items are moved between collections, the barcodes will remain unique and do not interfere with existing item barcodes.
- Use the simplest numbering scheme possible that still meets your needs.

Sample Barcode Numbering Scheme

The following is a sample library barcode numbering scheme. This scheme supports management of up to 899 libraries with each library having up to 300,000 patrons and 700,000 items. You can vary this scheme to handle more libraries, groups within a library, or independent items.

- N O T E -

It is recommended that you avoid starting barcodes with zero ("0") as the first digit. Barcodes can contain letters and numbers; spaces and punctuation are not allowed.

This sample scheme uses a 9-digit barcode number for items and patrons.

- **Digits 1 to 3** identify the library. For example, 100 is Eastside Library, 200 is Westside Library, and so forth.

You can use the three digits within this group to further breakdown the libraries. For example:

- 110 — Eastside Elementary School’s library
- 130 — Eastside Middle School’s library
- 150 — Eastside High School’s library
- 210 — Westside Elementary School’s library
- 230 — Westside Middle School’s library
- ...and so on

If you have more than one library in your system, using unique barcodes for each library’s collection makes it easier to manage a central catalog with holdings from all libraries in the district. All barcodes are unique and do not interfere with barcodes for existing items.

- **Digit 4** can tie a barcode to a patron group such as students or staff, to a medium type or vendor, or to an item group such as fiction or reference. For example, if you use 0 through 2 for patrons and 3 through 9 for items, you will have unique barcode numbers for 3 patron groups and 7 item groups.
- **Digits 5 through 9** identify the individual patrons or items in the group.



NOTE:

The spaces between numbers in the barcode example to the right are for readability. The actual barcode would be entered as:  
**110200361.**

Using the above scheme, you would have barcodes like the following. The bold digits identify the library, the underlined digit identifies the patron or item group, and the remaining digits identify the particular patron or item.

- 110** 2 00361      **110** identifies the library
- 2** identifies the patron or item group
- 00361** is the specific patron or item’s number

If you have a smaller number of patrons, you can choose a simpler code with fewer digits. The main objective is to keep the number of digits the same for items and patrons to ensure that each library in a district has a unique range of barcode numbers, and to use the most straightforward numbering scheme that meets your needs.

## Classes of Barcode Labels

There are two classes of barcode label.

- **Photocomposed labels** are made using a photographic process to create high-quality, long-lasting labels. Rather than printing ink on paper, the photocomposed process makes the barcode image an integral part of the label. These labels usually come with high-quality lamination and adhesives that make them durable and easy to attach. You should use photocomposed labels on all permanent items.
- **Printed labels** are made using a printing process that places the ink on top of the label. These labels require protection of some kind to keep the ink from rubbing off. An extra protection label of transparent Mylar can be placed on these to extend their lives. Although the cost of these labels is less than photocomposed labels, the protection and labor they require can cause them, in most cases, to cost more. Printed labels without extra protection are most cost-effective when printed by you in your library and used for temporary items such as magazines and newspapers.

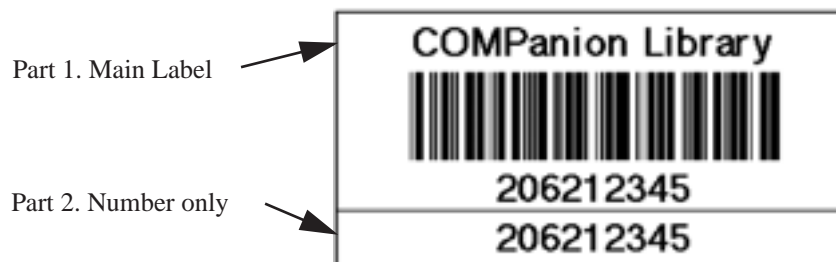
## One and Two-Part Labels

You can purchase either one or two-part barcode labels, depending on how you plan to use them. One-part labels include the library name, barcode, and written number.



If you want to place a barcode label in two different locations on an item, you can order two copies of these one-part labels.

Two-part labels include the same information as the one-part label. The two-part labels also include a second portion on the label, which display the written barcode number.



The second part of the label is useful to attach to a shelf list card or placed in the book in a different location than the upper portion.

Two-part labels provide the benefits of having two labels for each item, at a lower overall cost.

## Where to Place Barcode Labels

You can place barcode labels on the inside or outside of items. A label on the outside is easy to locate, but is subject to much greater wear and tear, therefore shortening its life.

Most Alexandria users place their labels on the inside back cover of books and on the outside of items such as records, tapes and CDs.

If you plan to place barcode labels under a clear jacket cover, test your barcode reader to make sure it can read the labels through the jacket cover.

Placing barcodes vertically on the back cover next to the spine can make inventory easier since you wouldn't need to fully remove the books from the shelf to scan them with a barcode reader.

## When to Label Items

You can label items either before or after you enter your item information.

For an existing library collection, it's usually easier to purchase your barcode labels early and place them on the items before the item information is entered into the computer. Use two-part labels for this method. As you place the barcode on the item, place the second label on the shelf list card that will be used for entering item data into the computer.

If you are starting a new library, be sure to purchase bibliographic information for your items in a computer-readable format (MARC or MicroLIF). Either order your books with barcode labels attached, or tell your supplier which numbers to assign (in the MARC/MicroLIF records). Have the numbers assigned in call number order so it's easy for you to locate the item for each barcode label you have to apply.

## Barcode Readers

Your computer requires a special device designed to read a barcode number and enter the corresponding value into the computer. This device is called a *barcode reader* or *scanner*.

There are a number of different types of barcode readers available, including light pen readers, laser readers and portable readers. The device you choose depends on your budget and the library's requirements.

Wand or pen-type readers are the least expensive devices for reading barcodes. CCD wedge or laser scanners are more expensive but do a better job reading the labels (especially in those hard-to-reach item places).

Portable readers give you the freedom of going to your bookshelves to scan labels, rather than having to take the books to the computer to be scanned. Portable readers are especially useful during inventory.

## Enter Item Data

The process of taking existing catalog information (usually on catalog cards) and converting the information into a machine-readable format is called *retrospective conversion*. This process takes time and effort. If you have an existing collection, now is a good time to examine your collection and remove unused and outdated items.

There are several methods of converting your data for Alexandria.

- **Retrospective Conversion:**

You can hire a retrospective conversion company to create MicroLIF and MARC records for all items in your collection.

Before sending your shelf list to the conversion company, assign barcode numbers to the items in your collection and record the barcode and other local information on the catalog cards. The MARC records you receive and import into Alexandria will be complete, and you will have no additional data to enter.

This process can be time-consuming and expensive, but it is the most complete retrospective conversion method available.

- **COMPanion's SmartMARC software:**

COMPanion offers **SmartMARC**, a software program that can access hundreds of Z39.50 collections using a standard internet collection. **SmartMARC** can also be purchased with **Brodart's Precision One** CD-ROM database of MARC records. You input minimal information (e.g. title, author, ISBN and/or LCCN) and then SmartMARC searches for MARC records matching that information.

Once the process is complete, you can add local information such as call number (tag 852\_h), barcode number (tag 852\_p), price (tag 852\_9), item type (tag 949\_a), special funds (tag 852\_1), and volume (tag 092\_v) to your MARC records.

This process can save many hours of retrospective conversion. If you plan to do your own retrospective conversion, this is the best alternative.

- **Import item records into Alexandria from another source:**

You can enter information using any database program that can create a TEXT file in a tab-delimited format.

- **Enter the information directly into Alexandria:**

This direct approach is more time-consuming, but is also cost-effective.

Many book vendors offer MARC/MicroLIF records on disks or CD-ROMs for the items they sell. Conveniently, Alexandria can read MARC or MicroLIF records directly, saving you the time and energy of typing item information directly into the computer. If you are automating a new library, ask for these records when you order items.



## Enter Patron Data

In the same way that you must enter item information into Alexandria, you must also enter information about the patrons who use your library. Patron information can be entered one patron at a time using the **Patrons** window or imported from another source.

Imported patron data can come from any source that provides a *tab-delimited* file format. In many cases, patron data is available in machine-readable format from your school's office or at the district office. Check with your school or district office to find out how patron data is stored.

## Set Your Library Preferences

There will always be rules that govern how patrons use the library, how items are managed and how the library operates. Alexandria uses preferences to establish and apply these rules.

School libraries, for example, can set preferences that allow tenth grade students to check items out for a longer period of time than second grade students. The check out period for reference items can be set for one day, while fiction and nonfiction works can be set for two weeks.

Alexandria collects statistics on each group of patrons, such as the types of items they borrow and when they return these items. These statistics are generally used to determine usage patterns for the library to help schedule staff and make management decisions.

For each group of patrons and items for which you collect usage statistics, you should assign a separate policy. For example, if each grade level of students has its own policy, the statistics generated are more useful than if you have only one policy for all students.

See the related preference chapters for information about how to apply and set rules for your library.

## Develop a Machine Maintenance Strategy

Although computers today are very useful tools, they can experience damage through excessive use, power fluctuations, crashes, and incorrect operations. To discover and postpone such damage, you should run maintenance utilities such as **Scandisk** or **Disk Defragment** on Windows and **Norton Disk Doctor** on Macintosh. Alexandria should *not* be running during these maintenance operations.

In addition, you should regularly perform a virus scan with products such as **Norton Anti-Virus** or **McAfee Virus-Scan**. Again, Alexandria should *not* be running when performing such virus scans.

## Develop an Alexandria Maintenance Strategy

Corruption can occur to any database of information via hardware or operating system mishap. It is recommended that you use Alexandria's **Rebuild Utility** on a regular basis (once a month is usually sufficient). However, hardware or system failure may necessitate using the utility more often. The **Rebuild Utility** disables all services while it is cleaning your data and can take several hours depending on the size of your data and speed of your machine. You should backup or archive prior to running **Rebuild**, just as you should with any other utilities.



## Evaluate the Security of Your Data Station

Some libraries may not have the funds or hardware necessary to have a dedicated Data Station. If your Data Station is accessible to the general public, you may want to enable additional security that would prevent unauthorized users from deleting, renaming, or moving your Alexandria application or **Data** folder. Some file security may be built into your operating system; some operating systems have no such security and would require purchasing third party software to provide that file security.

If you don't have file security on your Data Station, you should be extra vigilant in backing-up your **Data** folder.



# Installing Alexandria

This chapter describes how to install the Alexandria Data Station and other standard Alexandria clients. The instructions in this chapter assume you have a working knowledge of your computer operating system.

Before you install Alexandria, make sure you have the registration letter that came with your program. This letter contains information required during the installation process.

## Hardware and Operating System Recommendations

Alexandria can operate with MacOS and Windows-based systems. With the exception of minor differences between the controls at the top of windows and minor differences in the operating systems, the program operates identically across both platforms.

The following are the hardware and operating system recommendations for Alexandria:

### Hardware & System Recommendations

<b>Alexandria</b> (Data Stations)	Macintosh Data Stations - MacOS 9.2.2 or higher. CarbonLib 1.6 (required for those running OS9). G4 Power PC suggested, G3 Power PC minimum. 256 MB RAM or higher. Minimum resolution 800 x 600, 256 colors. or PC Data Stations - Windows 98 or higher. Pentium 4 suggested, Pentium III minimum. 256 MB RAM or higher. Minimum resolution 800 x 600, 256 colors.
<b>Alexandria District Librarian</b>	A fixed TCP/IP address is required (single user systems do not require networking).
<b>Alexandria Web</b>	Alexandria Web requires a web browser for remote access and TCP/IP active on the Data Station. Use the Data Station's TCP/IP address in your web browser to search your collection.
<b>Alexandria Librarian</b>	Mac Librarian Workstations - MacOS 9.2.2 or higher. G4 Power PC suggested, G3 Power PC minimum. 128 MB RAM or higher. or PC Librarian Workstations - Windows 98 or higher. Pentium 4 suggested, Pentium III minimum. 128 MB RAM or higher.
<b>Alexandria Researcher</b>	Mac Researcher Workstations - MacOS 9.2.2 or higher. G3 Power PC or higher. 128 MB RAM suggested, 64 minimum. or PC Researcher Workstations - Windows 98 or higher. Pentium III or Pentium IV, 500 MHz processor. 128 MB RAM suggested, 64 minimum.

## Alexandria Communication Systems

Alexandria uses TCP/IP (see *“Communication Protocols”* on page 4) to communicate between the Data Station and its clients.

<b>W A R N I N G !</b>
If you use clients, the Alexandria Data Station must have a fixed TCP/IP address. The address for the Alexandria Data Station cannot be dynamically allocated and must be static.

If you have questions during installation, contact COMPanion's Technical Support Services at (800) 347-4942 or (801) 943-7277, by Fax at (801) 943-7752, by toll-free fax at (888) 515-3883, or by email via *“support@companioncorp.com”*

If you have a full time Internet connection, you can send email directly to COMPanion from Alexandria if you have a personalized return email address (see *“Information”* on page 131). To email Technical Support, choose **Tech Support** under the **Apple Menu** on Macintosh, or under the **Help** menu on Windows.

**Installation Summary** (read this first)

If it doesn't already exist, the installer creates an **Alexandria** folder and installs the Alexandria program inside this folder. All your valuable library data will be stored in a folder located in the system shared application directory (*see page 4*). Once installed, the Alexandria program (also called the Data Station) will allow installation of the other clients.

The Data Station is where all your library data is saved. The Data Station can perform all the functions of an **Alexandria Librarian** and **Alexandria Researcher** client.

If you have a single-user license, you'll only be using the Data Station and no further clients will be created.

If you only have a few computers, you may want your main circulation machine to also be your Data Station. In this case, you wouldn't typically install another **Alexandria Librarian**. Your Data Station will be used by the **Librarian** for circulation and reporting.

In a middle-sized configuration, you may have a machine in the "back room" only for infrequent librarian use. Install the Data Station on this machine and the **Alexandria Librarian** and **Alexandria Researcher** on other machines.

If you are planning to have a large number of clients, you'll want to install your Data Station on a dedicated machine (i.e. the machine will only run the Data Station and will not typically be used by an operator). In this configuration, you'll be running **Alexandria Librarians** and **Alexandria Researchers** on other machines.

Detailed below are the general steps required to install Alexandria. More instructions are included throughout the remaining sections of this chapter.

- Step 1. On the machine you are going to use for your Data Station, visit COMPanion's Web site ([www.goalexandria.com](http://www.goalexandria.com)) and download the latest **Alexandria Installer**. You can also insert the Alexandria CD-ROM and double-click on the **Alexandria folder**. The **Alexandria Installer** is located inside this folder.
- Step 2. Once Alexandria is installed, double-click on the **Alexandria** program icon. Enter your registration information. If your system doesn't have the necessary resources to allow client installation, Alexandria will attempt to download them from COMPanion's update server. In this case, installations may not be possible until the next time you launch Alexandria.
- Step 3. To install Alexandria **Researcher** and **Librarian** clients over the web, you'll need to open an internet browser on the machine you wish to install the client. In the address bar of the browser window, type in the IP address of the main **Alexandria Data Station** followed by `"/install"` or `"/install_mac"` depending on your operating system. Follow the instructions that appear on the browser page and you'll be able to install your clients. For more information on installing clients from the web see "Installing Alexandria Clients" starting on page 31.
- Step 4. If you've licensed **Alexandria Web**, your activation code turns it on—all you need to do is set **Alexandria Web preferences**.
- Step 5. If you've licensed **Alexandria WAN** capabilities, your activation code turns it on—all you need to do is set **Address Books** in **Administration Preferences**.
- Step 6. If you've licensed **Alexandria Explore**, your activation code turns it on—all you need to do is set your **Alexandria Researcher Explore preferences**.
- Step 7. If you've licensed **Z39.50 Server** or **Z39.50 Client**, your activation code turns them on—all you need to do is set **Address Books** in **Administration Preferences**.

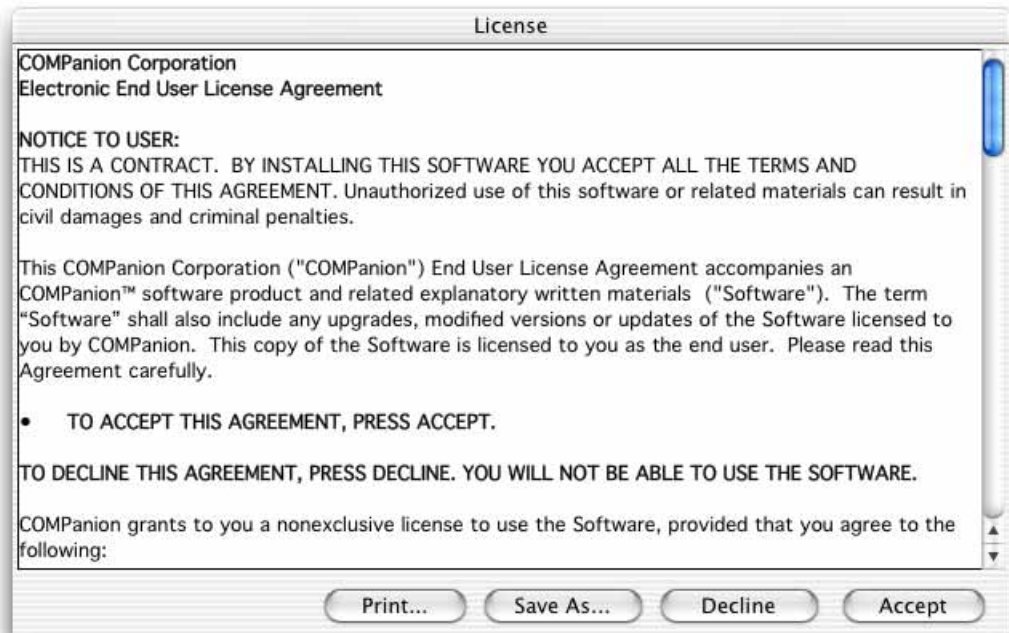
## Installing Alexandria for Macintosh

Use the following instructions to install **Alexandria** or **Alexandria District Librarian** on the Macintosh. If you are installing the **Alexandria District Librarian**, follow these directions using the **District Librarian Installer** instead.

- Step 1. On the machine you are going to use for your Data Station, insert the COMPanion CD and double-click on the **Alexandria** folder. The Alexandria installer is located inside this folder. You can also visit COMPanion's Web Site ([www.goalexandria.com](http://www.goalexandria.com)) and download the latest Alexandria installer.
- Step 2. Double-click the **Alexandria Installer** icon. When the Alexandria installer splash screen appears, click on **Continue**.



- Step 3. Next, the COMPanion Electronic End User License Agreement appears. Read the license carefully and click the **Accept** button if you accept the terms of the license. If you do not accept the terms of the license, click on the **Decline** button.



- Step 4. When the following window appears, verify that the **Install Location** specifies where you want Alexandria installed. The default is the hard drive where the currently active System Folder is located. This is usually the best location to install Alexandria. Click **Install**.



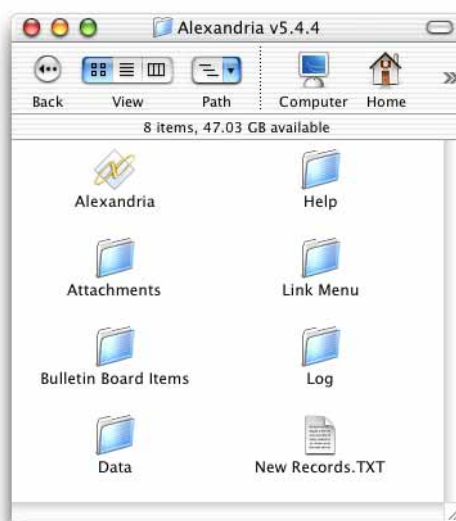
- Step 5. During installation, a window similar to the following displays the installer's progress. To stop installation, click the **Stop** button.



- Step 6. When the installation is complete, a confirmation window appears. Click **Quit**.



- Step 7. Eject the CD by dragging its icon to the **TrashCan** icon. Store the CD-ROM in a safe place for future use.
- Step 8. An **Alexandria v5.4.4** folder is now installed. Below is an example of the window that appears when you install the Data Station.



- Step 9. Note: The user documentation is included on the Alexandria CD-ROM (in ".pdf" format) but is not installed with the application. You can double-click the documentation icon on the CD-ROM to open it directly or you can copy it to your hard drive and open it there. If the documentation is copied to the **Links Menu** folder, you can access it from within Alexandria.

If you don't have **Adobe's Acrobat Reader** installed on your machine, an installer is included in the **Utilities** folder of the COMPanion CD or from Adobe's web site:

"<http://www.adobe.com/products/acrobat/readstep.html>"

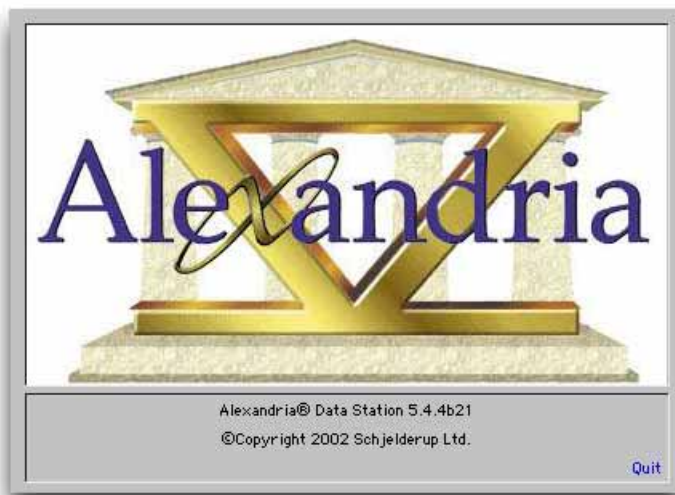


Step 10. Double-click the **Alexandria** icon to start the program.

**W A R N I N G !**

If you have PPP installed, but not running, the Alexandria Data Station may try to connect through PPP. If the connection window appears, click **Stop** to keep the Data Station from connecting through PPP.

Step 11. When you start Alexandria, the following window appears. If you have not yet registered Alexandria, a registration window appears (described in Step 12). Otherwise, the **Circulation** window appears.



Step 12. The first time you start the Data Station, the following registration window appears. Enter your **Registered To** library name, **Product Codes**, **Serial Number** and **Validation Code** from your registration letter and click **OK**.

Step 13. That's it. You've installed your Alexandria Data Station. If you've purchased a single-user license, you're finished installing. If you've licensed additional clients, see "Installing Alexandria Clients" on page 31.

## Installing Alexandria for Windows

Use the following instructions to install **Alexandria** or **Alexandria District Librarian** on Windows. If you are installing the **Alexandria District Librarian**, follow these directions using the **District Librarian Installer.exe** instead.

- Step 1. On the machine you are going to use for your Data Station, insert the COMPanion CD-ROM, locate it using the **My Computer** icon on your desktop. Double-click the CD icon and then double-click on the **Alexandria** folder. The Alexandria installer (**Alexandria Installer.exe**) is located inside this folder. You may also go to COMPanion's web site ([www.companioncorp.com](http://www.companioncorp.com)) and download the latest Alexandria Installer.
- Step 2. Double-click the **Alexandria Installer.exe** icon. When the Alexandria Setup splash screen appears, click **Next** to continue.



- Step 3. On the **Welcome** window, click **Next** to continue.

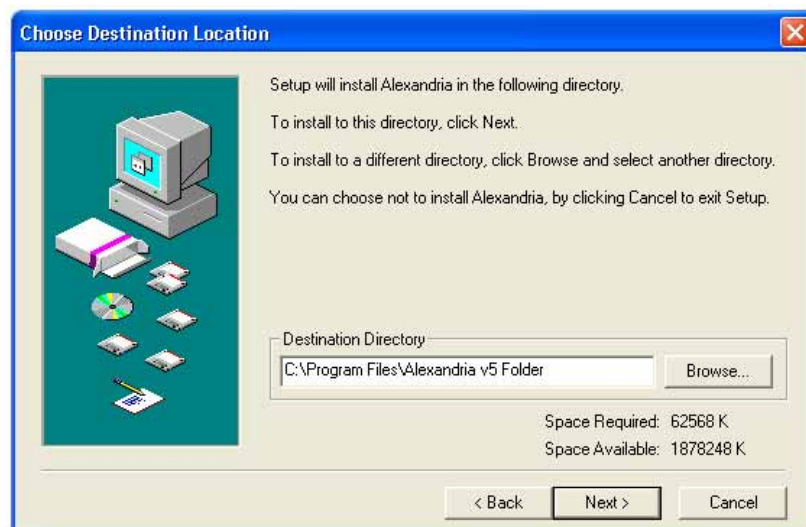


- Step 4. The COMPanion Corporation Electronic End User License Agreement appears. Read the license carefully and click the **Yes** button if you accept

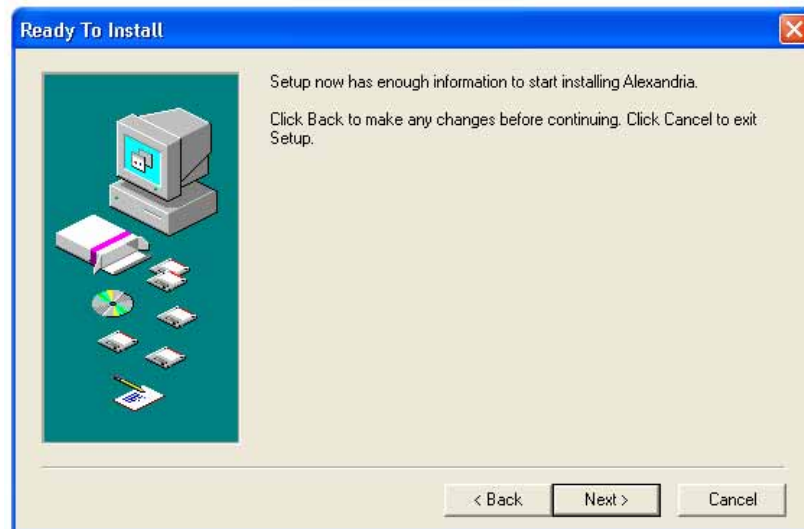
the terms of the license. If you do not accept the terms of the license, click the **No** button.



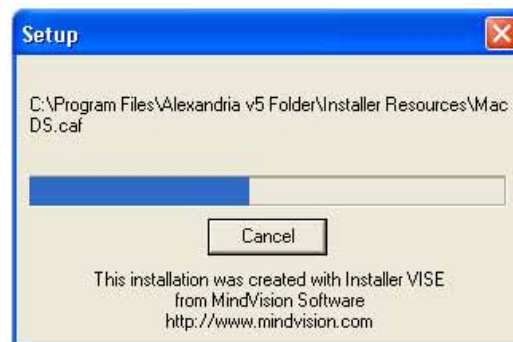
- Step 5. Verify that the **Destination Directory** specifies the location where you want Alexandria installed. The default is the **Program Files** directory. This is typically the best location to install Alexandria. Click **Next**.



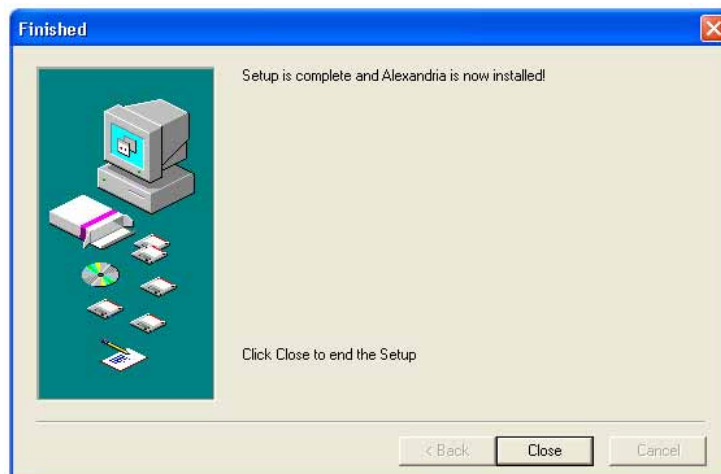
Step 6. On the **Ready to Install** window, click **Next** to continue.



Step 7. During installation, a window similar to the following shows the installer's progress. To cancel installation, click the **Cancel** button.



- Step 8. When the installation is complete, a confirmation window appears. Click **Close**.



- Step 9. Eject the CD-ROM and store it in a safe place for future use.
- Step 10. An **Alexandria folder** is now installed. Below is an example of the window that appears when you install a site license.



- Step 11. Note: Alexandria's User Manual documentation is also included on the Alexandria CD-ROM but is not installed with the application. You can double-click the documentation icon on the CD-ROM to open it directly or you can copy it to your hard drive and open it there. If the documentation is copied into the **Link Menu** folder, you can access it from within Alexandria.

If you don't have **Adobe's Acrobat Reader** installed on your machine, an installer is included in the **Utilities** folder of the COMPAnion CD or from Adobe's web site:

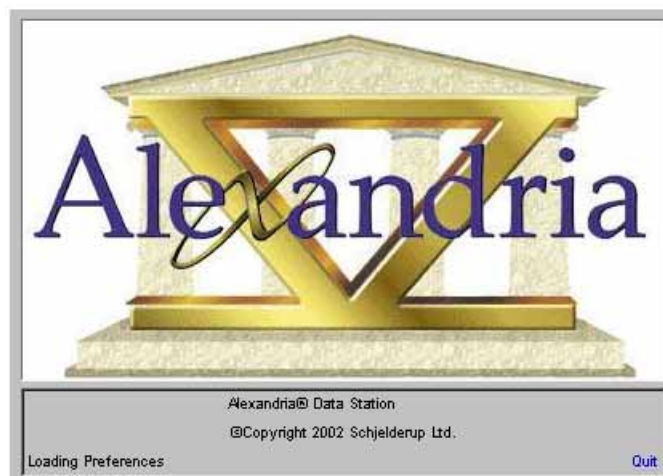
"<http://www.adobe.com/products/acrobat/readstep.html>"

- Step 12. Double-click the **Alexandria** icon to start the program.

### W A R N I N G !

If you have PPP installed, but not running, the Alexandria Data Station may try to connect through PPP. If the connection window appears, click **Stop** to keep the Data Station from connecting through PPP.

- Step 13. When you start Alexandria, the following window appears. If you have not yet registered Alexandria, a registration window appears (described in Step 14). Otherwise, the **Circulation** window appears.



- Step 14. The first time you start the Data Station, the following registration window appears. Enter your **Registered To** library name, **Product Codes**, **Serial Number** and **Validation Code** from your registration letter and click **OK**.

A screenshot of a registration window with a grey background and a red border. At the top right, there is a "Language" dropdown menu set to "ENGLISH (US)". Below this, the text reads: "Please enter your registration information in the spaces provided. This information is printed on the registration letter you received with your product. Press the TAB key to move between fields." There are four input fields: "Registered To", "Product Codes", "Serial Number", and "Validation Code". At the bottom right, there are two buttons: "Quit" and "OK".

- Step 15. That's it! You've installed your Alexandria Data Station. If you've purchased a single-user license, you're finished installing. If you've licensed additional clients, continue to the next section.

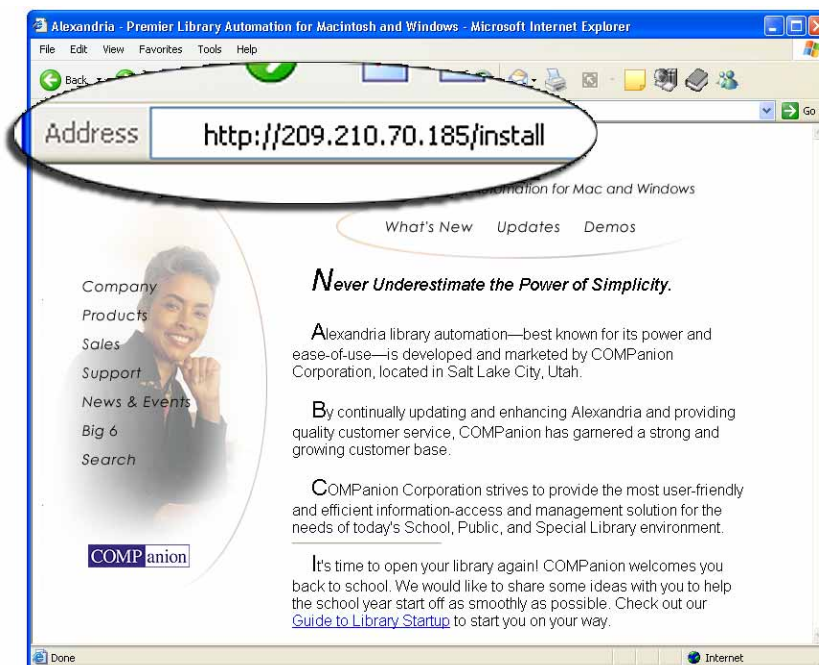


## Installing Alexandria Clients

If you have a license that supports multiple users, you can install Alexandria **Researcher** and **Librarian** clients on other computers in your library. Alexandria will install clients over the world wide web.

To install clients over the world wide web, make sure that you have an **Administrator User Name** and **Password** set up in the **Administration Preferences** of your the Data Station. You must also have the latest **Java** applet installed on your computer. If you don't, the following steps will instruct you on download and installation procedures.

- Step 1. Your main **Alexandria Data Station** must be running in order for you to install clients.
- Step 2. Determine which computer the client will be installed on. On that machine, open an internet web browser (i.e. an **Internet Explorer** or **Netscape Navigator** web browsing window).
- Step 3. In the browser **Address** field (located in the upper-left corner of the window), type the IP address of your **Alexandria Data Station** followed by **"/install"** (for Windows users or those running Macintosh OSX) or **"/install\_mac"** (for those running Macintosh OS 9.2.2).



If you are not sure what IP address your Data Station uses, it appears on your **Transaction log** each time Alexandria is launched. It is located approximately three lines down and will display **TCP Is Active, IP address is: [your IP address here]**.

Version Number - 5.4.4a12

Allocated memory will automatically be initialized to zero.

TCP Is Active, IP address is: 209.210.70.185

Web services activated.

Kid's Catalog services activated.

Z39.50 server services activated.

If you have problems locating your IP address, please contact your network administrator for further assistance. If your network administrator is not available, feel free to contact the COMPanion Technical Support team.

- Step 4. If you performed the latter step correctly, the **Alexandria Web Installer** page should appear.

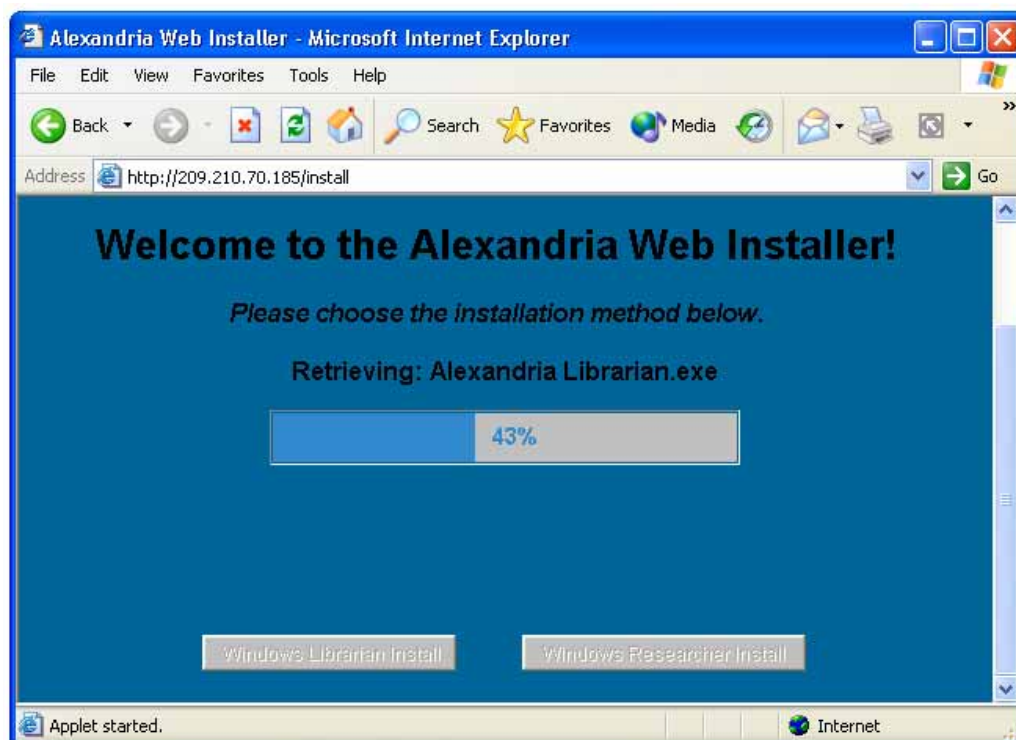


- Step 5. If you don't have the correct **Java** applet installed on your computer (in this case, **Java Plug-in 1.3**), you will be required to install it before you can download clients. Your browser should automatically detect whether you have the correct Java version installed. If it does not, follow the links and install instructions that the web page provides.
- Step 6. If your **Java** plug-in is up-to-date or you have just installed it, click the **Grant this session** button on the Java page to begin your **Web Install** session. Alexandria allows you to download a Windows or Macintosh **Workstation**.
- Step 7. A pop-up dialog box will require you to input your **Login User Name** and **Password**. Your user name and password are the same found on the **Administration Preferences** window of your **Alexandria Data Station**.





- Step 8. The client installer will be downloaded to your machine. After it has finished downloading, an **Alexandria** folder will appear on your operating system desktop with the appropriate installation files inside (this folder can be moved anywhere on your machine, it's only installed on the desktop to make it easier to find).



- Step 9. Double-click on the **Alexandria** installer icon to begin installation.

### Client Installer Resources

If you have a permanent internet connection, Alexandria will automatically verify that you have the necessary client **Installer Resources**. If any are missing, they will be automatically downloaded from our COMPanion server or created by the Data Station.

However, if this process fails, you'll have to manually place these resources into your **Alexandria** folder. If this is necessary, please contact our Technical Support team and follow their guided step-by-step instructions. **Installer Resource** files can be found on COMPanion CD-ROMs or downloaded from the COMPanion web site: "[www.goalexandria.com](http://www.goalexandria.com)".

## Configuring Alexandria Web

Alexandria Web is an optional feature of Alexandria. This feature is activated by information you enter on the Registration window during installation.

- Step 1. Under the **Edit** menu, select **Preferences**.
- Step 2. In the **Preferences** window, select **Web** in the field.
- Step 3. Set the Alexandria **Web** preferences for users who will be accessing Alexandria over the internet (see “Alexandria Web” on page 305).
- Step 4. To use Alexandria Web, launch your web browser (for example, Netscape Navigator or Microsoft Internet Explorer).
- Step 5. In the address field on your browser window, enter the IP address of your Data Station (the IP address is displayed in the transaction log when you first launch the Data Station) or DNS name assigned to that IP address by your system administrator. The address field is usually at the top of the browser window. On the Netscape Navigator window, the field is labeled either **Location** or **Go To**.
- Step 6. If you changed the port value when setting the Web preferences, type a colon followed by the port number at the end of your WWW address. For example, if the location of your Data Station is (www.alexweb.com) and you changed the port value to 81, type “www.alexweb.com:81/” in the **Address** field without the quotation marks.

### - N O T E -

If you are not familiar with browsers, domain names, IP addresses and other information referenced above, see your system administrator or other qualified individuals in your organization to help you get set up.

## Installing NetLink III

NetLink III is a set of catalog websites available in MARC format. If you've purchased this additional function, Alexandria performs the following:

- Additional utilities are enabled, allowing you to remove all NetLink III records if you no longer want to use them.
- Additional NetLink III reports are available so you can save and view data in a standard virtual word processing document.
- An internet connection to install or update your NetLink III records. To do this, select **Utilities** under the **File** menu. Under the **Utility Type** drop-down menu, select **Check For Updates** and then under **Operation** drop-down menu, select **Get Updates**. To install or upgrade your NetLink III records, click on the **Run** button to finish installation.

Updated records are available once a month. You can choose to update your database at any time it's convenient for you.

Please note that if your NetLink III subscription is not current, you will not be able to upgrade your records. However, you will be able to continue using your existing records.

- If you've purchased the additional NetLink III function, you'll need to import the NetLink III records into your Alexandria Data Station<sup>1</sup>. Drag and drop these files onto your Circulation window. Alexandria will recognize them as NetLink III records and automatically import them. There is no need to adjust any of the import preferences. NetLink III records are imported without copy information and are displayed in results lists as "Web" rather than checked "IN" or "OUT."
- You will *not* be able to export NetLink III records. Alexandria will *always* filter them out during any export operation.
- NetLink III records are licensed for use on *one* Data Station at a time. If you are running two Alexandria Data Stations, you need to purchase two NetLink III licenses.

## Installing Z39.50 Server

If you've purchased the Z39.50 server option, your Alexandria Data Station will accept Z39.50 queries from standard Z39.50 clients. Use the IP address of your Data Station for the Z39.50 server address. The Z39.50 server will use Port 210.

There are no Z39.50 preferences or other settings you need to configure.

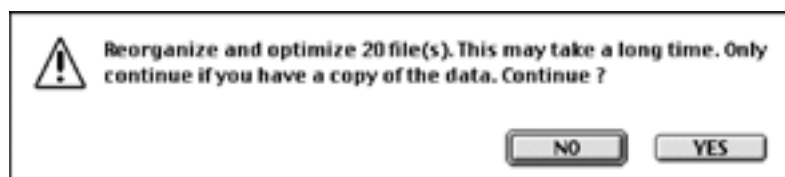
---

1. If you have not been licensed for NetLink III records, they will not import into your Alexandria System.

## Transferring data from Alexandria v3

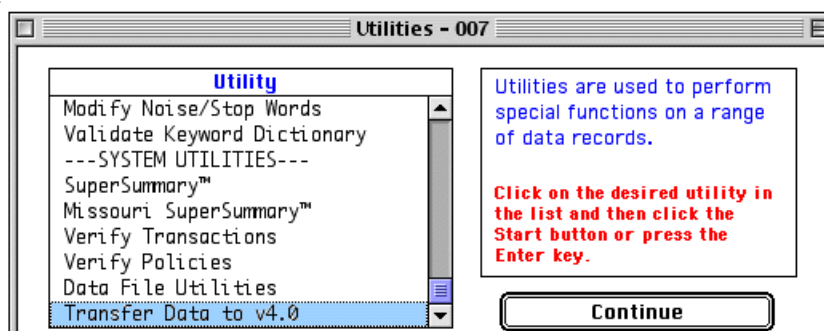
If you are upgrading from Alexandria v3, follow these simple instructions to transfer all your data into Alexandria v5.<sup>1</sup>

- Step 1. Backup your Alexandria v3 Data.
- Step 2. Start Alexandria v3 in single-user mode by holding down the <shift> key when Alexandria is launching. Confirm you are using Alexandria version 3.89 or later for the best conversion results. If not, update to the latest version of Alexandria v3 before converting data.
- Step 3. Just to be sure your Alexandria v3 data is in perfect condition, following the instructions in your User's Manual, perform the Reorganize and Optimize procedure on all files.



The confirmation dialog should indicate you are optimizing 20 files. If you didn't select all the files, click **NO** and try again.

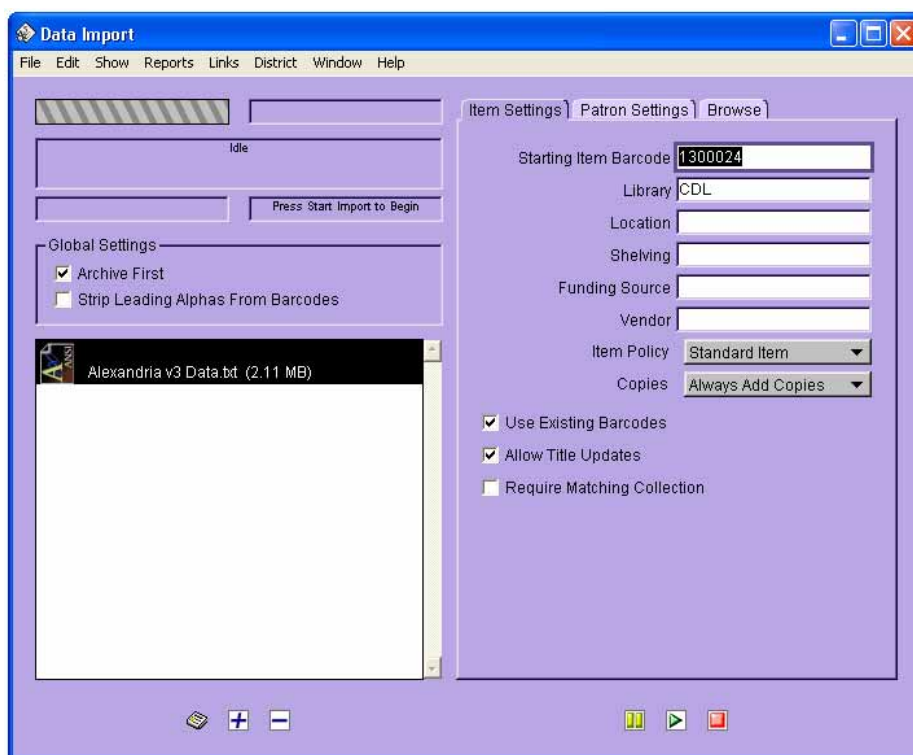
- Step 4. Once you've reorganized your data, run the **Verify Patron Status**, **Verify Item Status** and **Verify Transactions** utilities.
- Step 5. Select **Utilities** from the **File** menu.



- Step 6. Select **Transfer Data to v4.0** and click on the **Continue** button.

1. COMPanion offers an Alexandria v3 to v5 conversion service. Send your Alexandria v3 data to COMPanion with a PO for part number D7316 and we'll convert your data for a fee. This includes full conversion from v3 to v5—you'll receive back a CD-ROM via Federal Express with an Alexandria v5 folder ready to drag to your desktop. Your data will be imported and your system registered. All you have to do is drag an icon.

- Step 7. During export, a window will be displayed giving you status on the export of your data.
- Step 8. When the export is complete the window will announce “**Finished Exporting Record. Press OK to Continue.**” Click **OK**.
- Step 9. All your v3 data has been exported and can be found in the same folder as your Alexandria program with the name **Alexandria v3 Data**.
- Step 10. Copy this file to your Alexandria v5 folder.
- Step 11. Drop the file on top of the **Alexandria** Data Station Circulation window or program icon. Or, select the **Alexandria v3 Data** file using **Import** from the **File** menu.
- Step 12. The **Data Import** window is displayed.



- Step 13. Click on the **Start Import** button to begin the data transfer process. As your data is being imported, you'll see the transaction log updated. For the best performance, don't use your computer for other activities until the import is complete.
- Step 14. You should save your **Alexandria v3 Data** and v3 backup file for archive purposes.
- Step 15. Congratulations! When the import is completed, you are ready to use Alexandria v5 to manage your library.
- Step 16. It is recommended that you review and renew all of your preferences, as there are several new options, calendars, and passwords that do not transfer from **Alexandria v3**.



## Alexandria Basics

This chapter describes menus and basic operational rules used in Alexandria.

Alexandria menus follow operating system standards for Macintosh and Windows. For example, the **File** and **Edit** menus in Alexandria are very similar to the **File** and **Edit** menus in other applications. Additional menu items have purposes specifically related to library management.

Alexandria looks and operates almost exactly the same on Macintosh and Windows. However, the operating systems *are* different, and there are some minor dissimilarities between environments. For example, on the Macintosh you press the <cmd> key for menu shortcuts and in Windows you select the <ctrl> key. Windows and Macintosh have different controls for minimizing, closing, and resizing windows. In order to keep the documentation as clear as possible, this manual will generally discuss actions rather than operating system specific commands or controls.

Rather than “click the close box at the upper right of your window,” the manual will read “close the window,” and let the user select the operating system specific commands required to control Alexandria.

This manual contains images from both Windows and Macintosh versions of Alexandria.

### Macintosh & Windows Command Differences

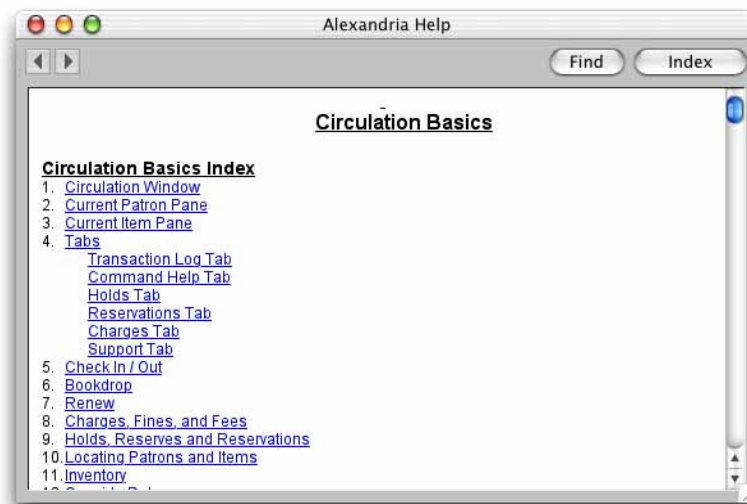
Macintosh Command Key	Windows Command Key	Usage
<cmd>	<ctrl>	Perform Menu shortcuts.
<option-tab>	<ctrl-tab>	Perform Authority Control.
<option>	<ctrl>	Display Tool Tip.
<option>	<alt>	Used to modify commands.

The following sections describe the basic operational elements found in Alexandria.



## Alexandria Help

Every Alexandria window will have a special **Help** button located on the top, far right. Click the round **Help** button to the right of the command line on the **Circulation** window to access the **Alexandria Help** window. These windows contain information directly related to the window you are using and explains (in detail) how to use them.



### Help

About Alexandria  
Tech Support  
Alexandria Help  
Open Release Notes

## Help Menu

On Macintosh there is an **Alexandria** drop-down menu that contains the **About Alexandria** and **Tech Support** selections. There is also a **Help** menu that contains **Alexandria Help** and **Open Release Notes** selections. On Windows, all these selections are located under the **Help** menu.

## About Alexandria

Shows copyright and version information.

## Tech Support

This opens the **Email Tech Support** option under the **Support** tab of the **Circulation** window, allowing you to send email to COMPanion if you are connected to the internet—even if you don't have your own STMP (simple mail transfer protocol) address configured (see “Email Tech Support” on page 247).

## Alexandria Help

If the **Alexandria Help** documents are installed on your system, this selection brings up the “**Help Index.vwp**” document. **Alexandria Help** documents are installed in the **Help** folder inside your **Alexandria folder**. To download the latest **Alexandria Help** files, run the **Get Help Files** utility under **Check for Update** (see “Check for Updates” on page 489).

## Open Release Notes

If the Alexandria release notes are available, this selection displays them. If available, this document is located in your **Alexandria folder** with the name **Alexandria Release Notes.txt**.



## File

New Document	Ctrl+Shift+N
Open	Ctrl+O
Close Window	Ctrl+W
Close All	Ctrl+Alt+W
Save	Ctrl+S
Save As Text	Ctrl+Alt+S
Save As	
Revert	
Import	
Export	
Utilities	
Page Setup	
Print	Ctrl+P
Log Out	Ctrl+Shift+Q
Restart	Ctrl+Shift+E
Exit Alexandria	Ctrl+Q

## File Menu

The Alexandria **File** menu provides the following selections.

**New Document**—Opens a new VWP document. VWP stands for **Virtual Word Processor**, Alexandria’s integrated word processor.

**Open**—Opens the standard operating system explorer window used to locate files. When you select a document from this window, Alexandria will open it (if it is able). Use this command to open VWP documents, TEXT documents, MARC documents, MicroLIF documents and other files for viewing.

**Close Window**—Closes the top window.

**Close All**—Closes all windows except for the **Circulation** window.

**Save**—Saves the contents of the top window.

**Save As Text**—Saves a copy of the currently visible word processing document as a TEXT file.

**Save As**—Allows you to save “.vwp” documents to specific locations on your hard drive.

**Revert**—Changes made to the current record are discarded and the original record is displayed in the window.

**Import**—Opens the standard operating system explorer window used to locate files. Import files can also be “dropped” onto the **Circulation** window.

The **Import** and **Open** commands are different. The **Import** command *assumes* you want to import the selected data file (if it is valid). The **Open** command *assumes* you want to *view* the selected data file, even if it’s a file than could easily be imported into Alexandria (see “Data Import and Export” on page 495).

**Export**—Opens the **Export** utility, allowing you to export items, patrons, or other miscellaneous data from the Alexandria database.

**Utilities**—Utilities are used to make global changes on batches of information in the Alexandria data file (see “Alexandria Utilities” on page 461).

**Page Setup**—Operating system standard function that sets the page up for printing.

**Print**—Prints the information in the topmost window. For example, if the **Patron** window is current, information for the **Current Patron** is printed when this command is selected. If the **Circulation** window is on top, then the transaction log is printed.

**Log Out**—This command closes the **Circulation** window and disallows anyone without proper authorization to access Alexandria. Instead, an **Alexandria Login** window appears, awaiting a correct **User Name** and **Password**. If a high-level user steps away from the Data Station and doesn’t want to quit or restart Alexandria, the **Log Out** function provides this service. The **Use Passwords/Security** box in **Administration Preferences** *must* be checked for this option to work.

**Restart**—Logs out the current users, closes all windows, restarts the Alexandria program, and if **Passwords/Security** is turned on, brings up the **Login** window. If no security has been activated, Alexandria just restarts to the **Circulation** window.

**Quit/Exit Alexandria**—Quits the Alexandria program.

Edit	
Can't Undo	Ctrl+Z
Can't Redo	Ctrl+Shift+Z
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Clear	
Select All	Ctrl+A
Speak Text	
Find	Ctrl+F
Find Again	Ctrl+G
Paste From File	
Preferences	Ctrl+;

## Edit Menu

This menu includes standard editing functions. You can cut, copy and paste text, clear a field, select all text, and paste from a file. Information about commands which are specific to Alexandria are included below.

**Undo**—This command only undoes typing or cut and paste operations in individual fields or in the word processor. It does *not* undo operations from other menus, commands and controls.

**Redo**—An undo for the undo.

**Cut, Copy and Paste**—You can cut, copy, and paste text from certain fields to others within Alexandria. For example, you can cut text from the **Title** field and place it in the **Notes** field. You cannot cut and paste entire library records. If you need to transfer entire records into another application, use the **Export** function to save the records you need in a format compatible with other programs.

**Clear**—Clears the selected text or selected list elements.

**Select All**—Selects all the text in the current edit field, current word processor document, or list.

**Find**—This selection opens the **Find** window. Depending upon what window is on top, **Find** can be used to locate a specific record from your database or text in a word processing file.

**Find Again**—Finds the next matching record or data in the word processor.

**Paste From File**—Allows the user to paste information from a file.

**Preferences**—This selection opens the **Preferences** window. Preferences are used to customize Alexandria for your needs (see “Introduction to Preferences” on page 61).

Show	
Authority Control	
Bulletin Board	
Circulation Statistics	
Dictionary Window	
Circulation	⌘T
Items	⌘I
Patrons	⌘L
Search	⌘K
Orders	
Budgets	
Vendors	
Subscriptions	
Routes	

## Show Menu

Use this menu to move between various Alexandria modules such as **Patrons**, **Items**, and **Circulation**. For example, if you need to manage patron information, select **Patrons** from the **Show** menu. To check out items or perform other transactions, select **Circulation**.

Each option in the **Show** menu has a corresponding chapter in this manual. Refer to the specific chapter for more detailed information about each function.

**Authority Control**—Opens the **Authority Control** window. Select this command if you would like to find, add, duplicate, remove, or view the authority-controlled fields of your library database (see “*Authority Control*” on page 221).

**Bulletin Board**—Used to create an electronic library bulletin board. Librarians can “post” items on the **Bulletin Board**, which all patrons can view via Alexandria Researcher. The **Bulletin Board** also allows the librarian to associate notes or library maps with item call numbers. Thus, when circulated item details are displayed, if an associated note or library map is available, it’s automatically included (see “*Bulletin Board*” on page 54).

**Circulation Statistics**—Shows the **Statistics** window. This window allows users to view a quick list of useful circulation statistics (see “*Show Circulation Statistics*” on page 57).

**Dictionary Window**—Opens Alexandria’s built-in **Dictionary**. This window allows users to look up word spelling or definitions using an assortment of internet sources and search options (see “*Show Dictionary Window*” on page 58).

**Circulation**—Shows the **Circulation** window. Select this command if you want to check out, check in, place holds, charge fines, place reservations, accept payments, or perform inventory and other circulation functions. The **Circulation** window is always open while Alexandria is running (unless logged in for Researcher-only privileges); use this menu command to bring it to the forefront.

**Items**—Shows the **Item** window. Select this command to examine, add, modify, or remove items, titles, or copy records from your library.

**Patrons**—Shows the **Patron** window. Select this command to examine, add, modify, or remove patron records.

**Researcher**—Shows the **Researcher** window. Select this command to search your library collection.

**Orders**—Shows the **Orders** management window. Select this command to examine, add, modify, or remove order records.

**Budgets**—Shows the **Budgets** management window. Select this command to examine, add, modify, or remove budget records.

**Vendors**—Shows the **Vendors** management window. Select this command to examine, add, modify, or remove vendor records.

**Subscriptions**—Shows the **Subscriptions** management window. Select this command to examine, add, modify, or remove subscription records.

**Routes**—Shows the **Routes** management window. Select this command to examine, add, modify, or remove route records.

## Reports

Special Reports

Patron Reports

Item Reports

Circulation Reports

Usage Statistics

Order Reports

Subscription Reports

Quick Reports

## Reports Menu

Use the **Reports** menu to select a report category such as **Patron Reports**, **Item Reports**, or **Circulation Reports**. To read more about reports see:

"Introduction to Reports" starting on page 365.

"Special Reports" starting on page 371.

"Patron Reports" starting on page 383.

"Item Reports" starting on page 397.

"Circulation Reports" starting on page 419.

"Usage Statistics" starting on page 437.

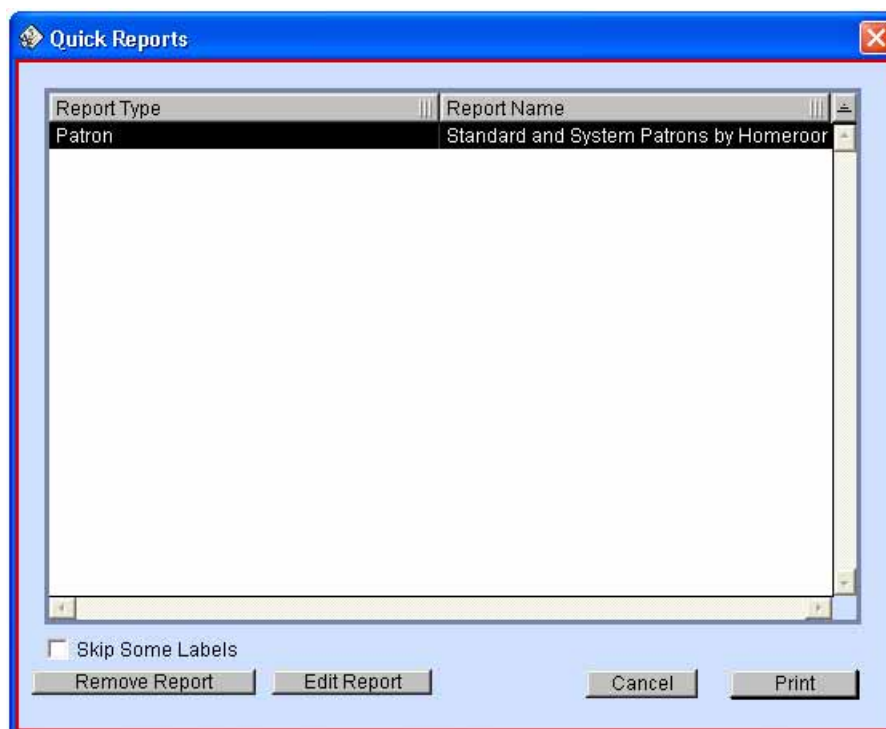
"Order Reports" starting on page 445.

"Subscription Reports" starting on page 455.

"Quick Reports" starting on page 368.

When you make a selection from this list, the **Report** window appears with a list of reports available in that category.

To access a list of frequently used reports that do not require you to choose any sort or search values, choose **Quick Reports** from the **Reports** menu. The following window appears.



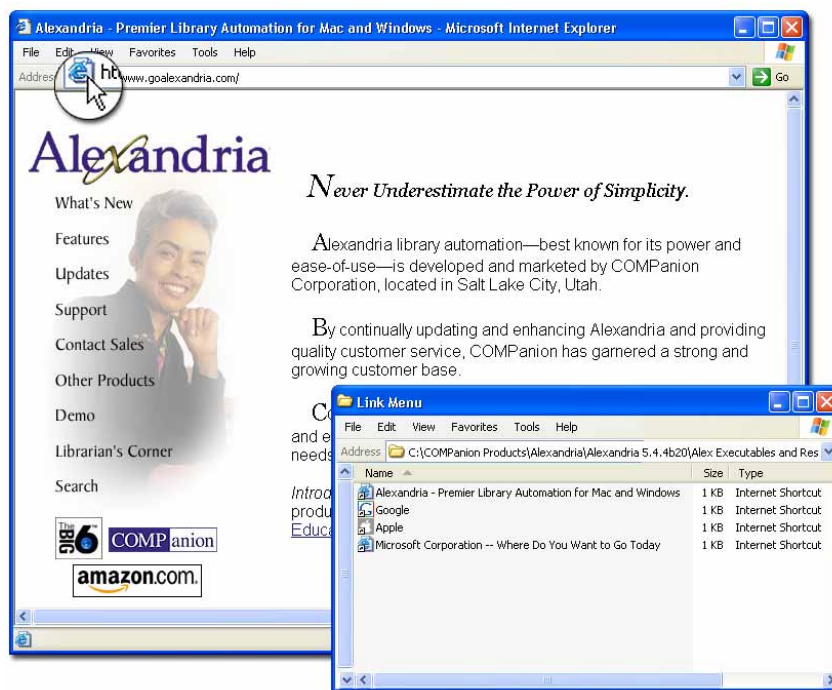
You can select a report and click the **Print** button or double click to generate the report without further data entry.

### - N O T E -

You create the reports that are shown in the **Quick Reports** window. To create a quick report, choose a report (with options) and then click on the **Create Quick Report** button (see "Quick Reports" on page 368).

## Links Menu

The **Links** menu provides an easy way for you to quickly jump to other programs and world wide web resources that you may need for your work.

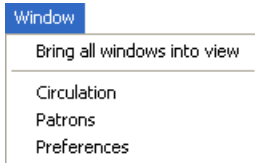


The **Link Menu** folder is automatically created in the same folder as your Alexandria program. Any document, program, URL, shortcut, or alias you place in this folder gets displayed in the **Links** menu. When you select an item from this menu, that document, program, URL, shortcut, or alias is launched.

The contents of the **Link Menu** folder on the Data Station are automatically copied to the **Link Menu** folder of Alexandria Workstations the first time the workstation client is run. After the **Link Menu** folder has been created, any changes made to a particular Workstation are for that Workstation only.

If the **Link Menu** folder is deleted, the Workstation will create a new one the next time Alexandria's launched and the default documents, programs, URLs, shortcuts, or alias will again be copied automatically from the Data Station.

URL links (pictured above) are generally little icons found just before the http address in the address bar field of your standard internet browser. Drag and drop any program shortcut (alias) or URL's into the **Link Menu** folder to make them appear in the **Links** menu.



## Window Menu

As you open new windows in Alexandria, the **Window** menu will display a list of all currently active windows. The example **Window** menu to the left shows that the **Circulation** window is open and active and the **Preferences** and **Patrons** windows are also open.

To choose a window, select it from this menu. The window you select gets focus and becomes the active window.

If you select **Bring all windows into view**, all minimized windows will appear, with focus placed on the **Circulation** window.

When you close a window, it is removed from this menu.

**Patrons**

First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Browse	Ctrl+B
Find	Ctrl+F
Unlock Record	Ctrl+U
New Patron	Ctrl+N
Duplicate	Ctrl+D
Remove Patron	Ctrl+R
Paste Patron Picture	Ctrl+Y
Remove Patron Picture	
Show Details	Ctrl+Shift+D
Show History	

## Management Command Menus

When each management window (**Patrons**, **Items**, **Circulation**) is selected, a separate command menu will be available. The commands within these drop-down menus are not always the same for every function. The following section describes how to use the standard functions in most of the management command menus.

The following section describes how to use the **Patrons** command menu, which is active when the **Patron** window is in the forefront. Use these menus to browse, find, add, and remove records. The other management windows have similar controls.

The **First**, **Previous**, **Next**, and **Last** commands display the indicated record based on the order of the records shown in the **Browse By** field. The arrows to the left of the **Browse By** field perform the same action as the **Next** and **Previous** commands.<sup>1</sup>

**First**—Shows the first record according to the current **Browse By** order.

**Previous**—Shows the previous record according to the **Browse By** order.

**Next**—Shows the next record according to the **Browse By** order.

**Last**—Shows the last record according to the **Browse By** order.

1. **SHORTCUT**—Hold the <shift> key down when you click on the left arrow to select the **First** record and <shift>-click on the right arrow to get the **Last** record.

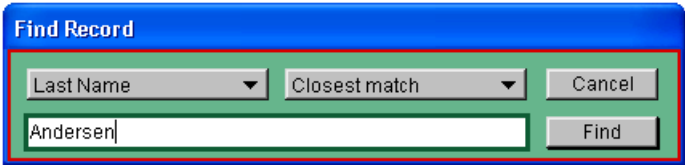
Edit	
Can't Undo	Ctrl+Z
Can't Redo	Ctrl+Shift+Z
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Clear	
Select All	Ctrl+A
Speak Text	
Find	Ctrl+F
Find Again	Ctrl+G
Paste From File	
Preferences	Ctrl+;

Finding Records

The **Find** command can be used to locate a specific record. Alexandria searches for a record that matches information you enter and shows the complete record in the main window.

For example, if you search for a patron with the name Andersen, Alexandria finds the first patron record with that name and shows it as the **Current Patron** in the **Patrons** window. The **Browse By** selection is automatically set to match your **Find** field.

When you select the **Find** command, the following window appears.



Click the arrows at the end of the **Last Name** field to choose to search other fields<sup>1</sup>. Click the arrows at the end of fields to choose to search for an item that starts with the information you enter or exactly matches the information you enter. If no record can be located, Alexandria will sound an audio alert and the current record will not be changed.

Click the **Find** button to locate the record, or click the **Cancel** button or close window box to cancel the **Find** operation.

1. **NOTE**—Because the terms shown in this menu can be customized by the user, your choices may have different names.



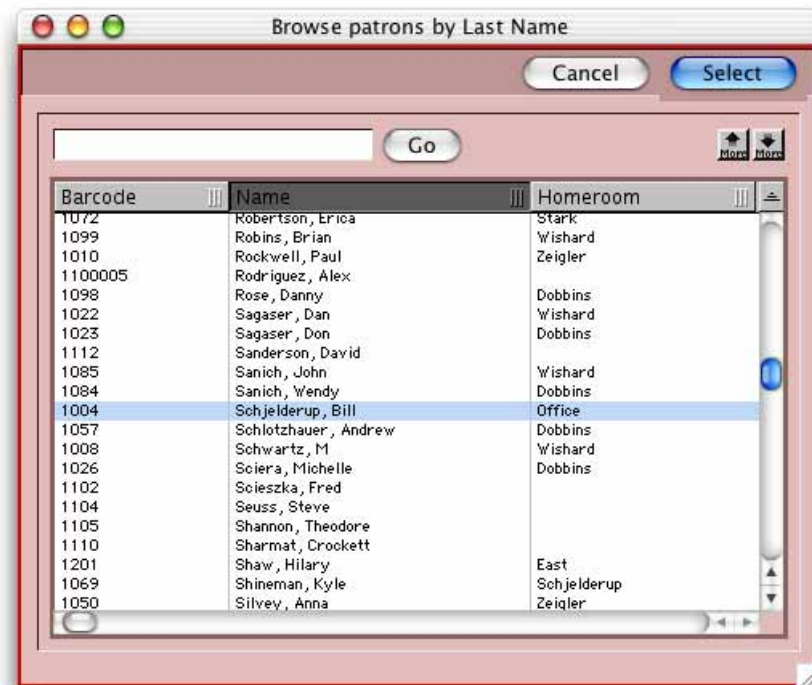
Patrons	
First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Browse	Ctrl+B
Find	Ctrl+F
Unlock Record	Ctrl+U
New Patron	Ctrl+N
Duplicate	Ctrl+D
Remove Patron	Ctrl+R
Paste Patron Picture	Ctrl+V
Remove Patron Picture	
Show Details	Ctrl+Shift+D
Show History	

## Browsing Records

An alternative to the **Find** command is the **Browse** command (located under **Show, Patrons, Patron command menu, Browse**) for locating the records you want to view. The initial window shows records before and after the currently selected record.

Use the up and down arrow keys on your keyboard to move through the list. To display more items, click on the **More** buttons on the top right of the window.

To make another search, enter text in the empty field to the left of **Go** and then click the **Go** button. For example, if you enter “Sch” for a patron name, a list of names that begin with “Sch” will be displayed. You can then select a specific record from the list.



To select an item from the list, either double-click on the item or click the item once then click on **Select**, or press <enter> | <return> on your keyboard.

When you select a record in the **Browse** window, that record is displayed. To exit the **Browse** window without changing the current record, click the close box or **Cancel**.

The **Browse** window shows entries in the order specified by the **Browse By** setting of the initial record management window.

In this example, records displayed in the window are sorted by **Name**, the value displayed in the **Browse By** field at the top of the **Patron** window.

Changing the **Browse By** field also changes the index drop-down menu on the **Find** menu.

Items	
Switch to MARC View	Ctrl+M
First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Browse	Ctrl+B
Find	Ctrl+F
Unlock Record	Ctrl+U
New Title	Ctrl+N
Remove Title	Ctrl+R
Modify Copy	
Add Copy	Ctrl+Y
Remove Copy	
Move Copy To This Title	
Duplicate	Ctrl+D
Paste Item Picture	
Remove Item Picture	
Show Details	Ctrl+Shift+D
Show Title Editor	Ctrl+Shift+T
Show Author Editor	Ctrl+Shift+A

## Changing Records

Before records can be changed, they must be unlocked. Use the **Unlock Record** command in the control menu or click the icon of the lock to **Unlock** the current record. **Display Setting** preferences can be set to automatically lock or unlock records for modification (see “Display Settings Preferences” on page 117).

## Adding Records

Use the **New Title** command from the **Items** menu to add records to your Alexandria database.

When you select this command, a window pops up—prompting you for information. The following example shows the **New Title** window.

Type over the grayed-out (watermarked) data entry fields in the window (such as **Title**, **Author**, and so forth in the example above) to add a new record.

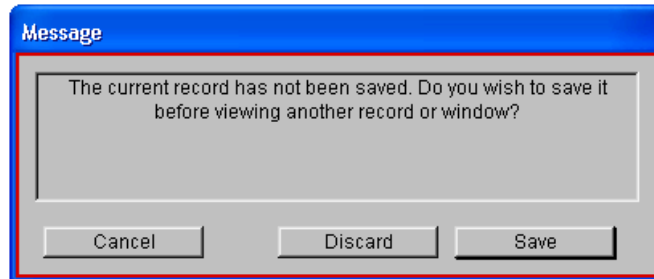
To move to the next data entry field (drop-down menu or button), press the <tab> key. To move to the previous data entry field (drop-down menu or button), press <shift-tab>. To edit a data entry field, click in the corresponding field. To change a selection in a drop-down menu using only your keyboard, use the <up> and <down> arrow keys when the drop-down is outlined. When a button is outlined and you wish to perform that action, press the <spacebar>.

When you enter any type of specially-formatted information such as dates, phone numbers, and social security numbers, you can enter values in a wide range of formats. For example, you can enter the date December 1, 2004 as: “Dec 1, 2004” or “12/1/04”<sup>1</sup> or “12.1.04” or “12 1 04”. If the year is 2004, you can just enter “12/1”. If the current month is December, you can just enter “1”.

1. When you enter a two digit date, values between 0-30 are assumed to be 2000-2030 and values between 31-99 are assumed to be 2031-2099.

When you have entered all the information for this record, click the **Save** button in the upper right-hand of the window. The record has now been saved. If you want to disregard the information you have entered, click the **Revert** button and the previous record information will be restored.

If you try to select another record or leave the window without saving your changes, the following warning message will be appear:



If you click on **Cancel**, you'll return to the previous window with your newly entered information intact. Click the **Discard** button if you want to disregard the data you just entered. Otherwise, click the **Save** button to save your input.

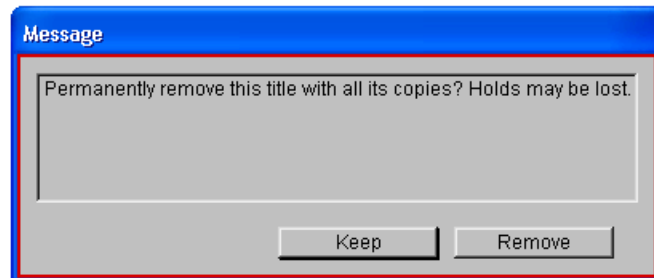
## Duplicating Records

Use this command to copy information from the current record into a new record. You can then modify the record to create a new one. This will save time when adding records that are similar.

## Removing Records

Use this command to permanently delete a selected record.

In most cases, a warning window will ask you to verify that you want the record permanently removed.



Click the **Remove** button to permanently remove the record or the **Keep** button to ignore the request to remove the record.

<b>W A R N I N G !</b>
You cannot undo a remove!

When a record is removed, all associated information is also removed. For example, removing a patron also removes any holds or reservations the patron has pending.

## The Alexandria Word Processor

Integrated into Alexandria is a powerful word processor. These days, everyone owns at least *one* word processor. Why, then, is the Alexandria approach to an integrated Word Processor superior? Here are a few reasons:

- The word processor is used throughout Alexandria to display reports and other informational windows. In most programs, this information is displayed in a standard window.
- Allows users to save reports for future reference. Word processor documents can be viewed, saved and printed.
- Allows users to customize reports. You can pick the font, eliminate unwanted information, enter notes, change the font size, update the heading, and much more. You can have your reports done YOUR WAY.
- Quickly create your OWN reports by cutting and pasting information from Alexandria reports.
- Send reports to others via email attachments—since you can save reports, you can electronically send them.
- The Alexandria word processor can open HUGE files that many word processors can't. Thus, you can view large import files before you import them—even 100MB files!
- Since all reports are created as word processor documents, you can preview each report before you print them. Other word processors might allow you to view reports on-screen, but usually only one page at a time, or a very limited page range. With Alexandria's Virtual Word Processor, you can see it all.
- The Alexandria Virtual Word Processor can provide your institution with a standard cross-platform tool for creating and exchanging reports. All documents are supported across Macintosh and Windows systems.
- Alexandria can prepare several reports for printing simultaneously. Most systems won't let you print more than one report at the same time—after all, in what order would the pages come out of the printer? With the Alexandria approach, all reports are prepared in the Virtual Word Processor and can be printed at a later time.

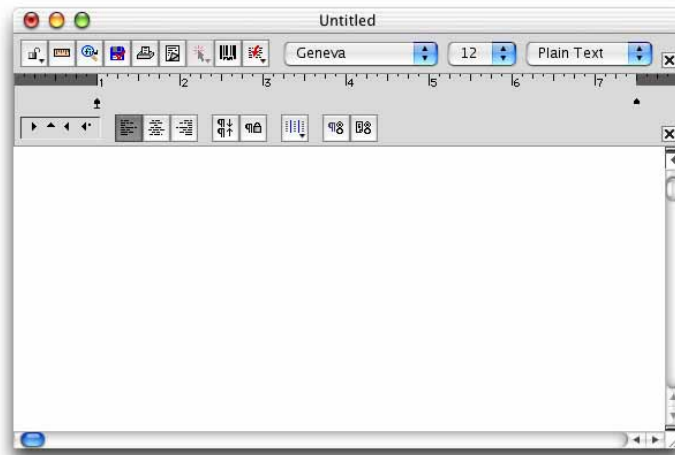
The Alexandria word processor is named VWP (Virtual Word Processor) since it uses a highly efficient virtual memory scheme, which allows it to support very large documents in a limited amount of memory.

VWP is available integrated within Alexandria, and as a stand-alone product. VWP is available for both Macintosh and Windows-based operating systems. VWP documents are fully cross platform—a document created on one can be viewed on the other.

VWP has the ability to support picture files created in drawing or paint programs—just paste them into your document.

Special support is specifically provided for code 39 barcodes so that they are printed at the highest possible resolution your printer is capable of handling. Therefore, with barcodes, what you see isn't exactly what you'll get. When printed, barcodes are printed at the highest possible quality setting.

To create a new word processor document, select **New Document** from the **File** menu. You'll see a window similar to this one.



As you move your cursor over interface controls, tool tips are displayed on the top-right of the window. Since most people are familiar with word processors, Virtual Word Processor's basic operations will not be documented. However, here is an overview of some of the special features available within the Virtual Word Processor.

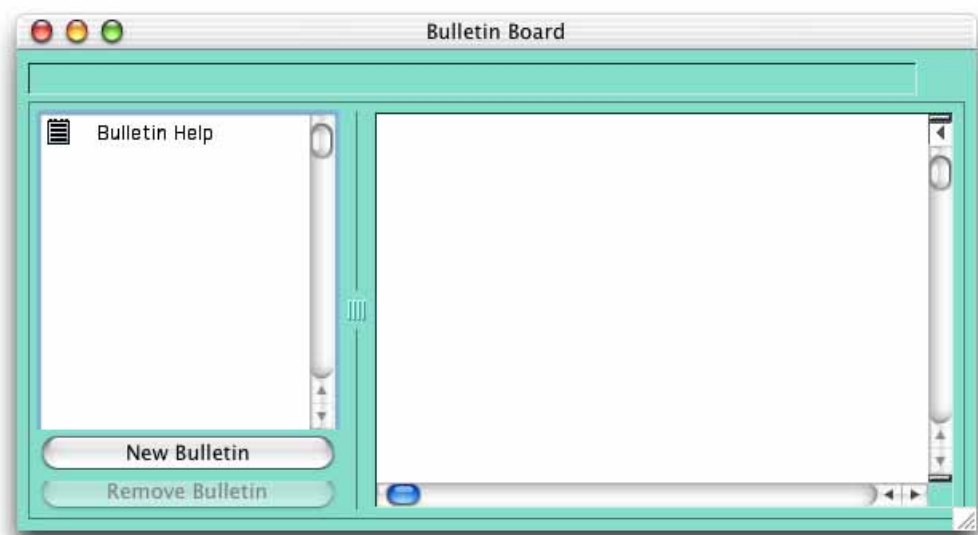
- Use the icon above the vertical scroll bars to hide/show the word processor tools or show/hide the graphical ruler.
- Click on the lock icon to lock or unlock the document. Locked documents can not be modified.
- Use the other icon controls to find text, save a document, print your document, set a page break, insert the date, insert the time, insert the current page number.
- Indents, margins, left, right, center and decimal tabs are supported.
- **Left**, **Center**, and **Right** aligned paragraphs are supported.
- **Font**, **Size**, and **Style** controls are available for any character. Style includes colored text.
- Paragraph "keep together" controls are supported.
- Supports headers and footers. To create a header or footer, drag the controls above and below the vertical scroll bars to create a header or footer area.
- Supports restricted column viewing for tabbed columns. When this is turned on, text that might overflow into another column is visibly truncated so that printed columns look nice. Since the data is still in the report, adjusting column width will expose more data. This is a very useful feature for viewing tabular-type reports.
- Supports URL links; <cmd>-click on a URL in VWP to open the link in your selected browser.
- Supports internal hot links for URL, VWP links and multi-media display. This capability is only currently available for documents created by Alexandria. It's mentioned here because it's a valuable capability of Virtual Word Processing that makes using Alexandria much more enjoyable and powerful.

Bulletin Board

First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Find	Ctrl+F
New Bulletin	
Remove Bulletin	
Edit bulletin entry	

Bulletin Board

The **Bulletin Board** is used to create an electronic Bulletin Board for your library. A librarian can “post” items on the **Bulletin Board**, which all students can view via Alexandria Researcher. **Bulletin Board** also allows the librarian to associate notes or maps with item call numbers. Thus, when item details are displayed, if an associated note or map is available, it’s automatically included. Select **Bulletin Board** from the **Show** menu to view the electronic Bulletin Board.



To remove a bulletin from the **Bulletin Board**, select it and click on the **Remove Bulletin** button.

Bulletins can be any Alexandria Virtual Word Processing document. You can even post Alexandria reports as Bulletin Board entries. Thus, rather than posting an overdue report to the wall of the library, you could post it to the Alexandria **Bulletin Board**.

To print the contents of a bulletin, select **Print** from the **File** menu, or click on the printer icon in the Virtual Word Processor control bar.

Bulletin Board	
First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Find	Ctrl+F
New Bulletin	
Remove Bulletin	
Edit bulletin entry	

**NOTE:**

Bulletin Board files are stored on the Data Station in a folder entitled **Bulletin Board Items**. Since this is not in the Alexandria Data folder, this folder should also be backed up to prevent loss in case of disaster.

## Adding New Bulletins

To add a new bulletin entry, click the **New Bulletin** button.

Enter the **Name** of the new Bulletin document and an optional **Expiration Date**. If you enter an expiration date, the item will be automatically removed on that date.

**- N O T E -**

Bulletin Board documents are standard word processing documents. They may contain text and/or graphics. If you want to add additional text with rules or additional hints on locating items, you can include anything you want.

Although Bulletin Board documents are standard word processing documents, they are transmitted frequently over the network—you'll want to limit yourself to short documents.

Only Librarian Workstations can **Add** or **Remove** entries from the Bulletin Board. Alexandria Researchers can only view entries. However, since Bulletin Board documents are standard Alexandria word processing documents, librarians can easily accept postings from students who have created their own bulletins using Alexandria Researcher.


Bulletin Board

First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Find	Ctrl+F
New Bulletin	
Remove Bulletin	
Edit bulletin entry	

Adding Bulletin Board Maps

To create a new map Bulletin, select **Map** in the **Bulletin Type** drop-down menu.

New Bulletin Board Item



Bulletin Type Map

Call Number Range

Begin

100

End

199.999

CancelOK

- N O T E -

Bulletin Board documents are standard word processing documents. They may contain text and/or graphics. Use a drawing program to create your library map and paste it into the word processing document.

Design your map in a program outside of Alexandria, such as Microsoft Paint, MacPaint, or Adobe Photoshop. When you are finished, **Copy** or **Cut** the image you have drawn to your operating system standard clipboard. When you open a new Bulletin Board Map VWP document, you can just **Paste** the image you have drawn into the document. The Virtual World Processor supports a majority of simple image file types, such as .PICT, .JPEG, and .GIF. Regardless of your operating system, COMPanion recommends that you have QuickTime installed on your computer.

Maps are always displayed at the bottom of the Bulletin Board list of items.



Show	
Authority Control	
Bulletin Board	
Circulation Statistics	
Dictionary Window	
Circulation	⌘T
Items	⌘I
Patrons	⌘L
Search	⌘K
Orders	
Budgets	
Vendors	
Subscriptions	
Routes	

## Show Circulation Statistics

The **Statistics** window can be viewed by selecting **Circulation Statistics** from the **Show** drop-down menu. Alexandria keeps a number of general circulation statistics for your library. These counters can be reset any time; most libraries will reset these on a yearly basis. Counters will increment as follows:

**Total Activity**—This counter will increment with every successful transaction.

**Total Copy Activity**—This counter will increment every time a new item is made current on the **Circulation** window.

**Total New Items Added**—This counter will increment every time a new item (title) is added through the **Items** window or by import.

**Total New Copies Added**—This counter will increment every time a new item copy is added through the **Items** window or by import.

**Items Lost from Inventory**—This counter will increment every time that an item which has the status of available is checked out to the **Lost Patron**.

**Total Items Lost by Patrons**—This counter will increment every time that an individual patron is held accountable for a lost item.

**Items Found**—This counter will increment every time that an item which was once lost becomes found and returned to the database.

**Total Items Removed Count**—This counter will increment every time an item (title) is removed from the Alexandria database.

**Total Copies Removed**—This counter will increment every time an item copy has been removed from the Alexandria database.

**Total Patron Activity**—This counter will increment every time a new patron is made current on the **Circulation** window.

**Total New Patrons**—This counter will increment every time a new patron is added to the Alexandria database.

**Total Patrons Removed**—This counter will increment every time a patron is removed from the Alexandria database.

**Total Copies Checked Out**—This counter will increment every time that an item copy is checked out to a patron.

**Total Copies Renewed**—This counter will increment every time a patron makes a renewal on an item copy.

**Total Copies Checked In**—A total count of all the available (checked in) item copies located within your library.

**Total Holds Placed**—This counter will increment every time a patron places a hold on an item copy (including Alexandria Web or Explore interfaces).

**Total Reservations Made**—This counter will increment every time a patron places a reservation on an item copy (including Alexandria Web or Explore interfaces).

**Total Lost Book Count**—This counter will increment every time a copy is checked out to the **Lost Patron**.

**Counters Last Reset On**—The date the counters were last reset to zero.

**Reset Counters**—This button will clear all the counters to zero.

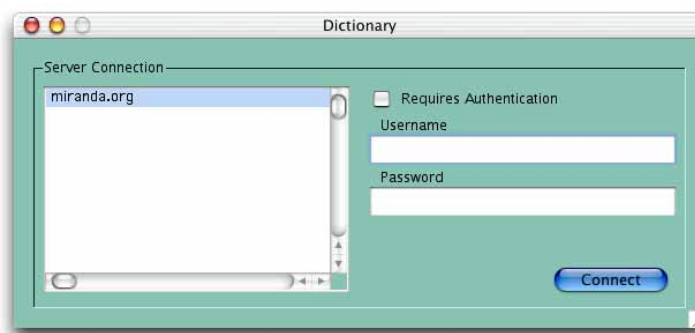
**Refresh Counters**—This button will check to make sure that all tallies are accurate by recalculating all the applicable informational fields.

**Show**

Authority Control  
 Bulletin Board  
 Circulation Statistics  
 Dictionary Window  
 Circulation ⌘T  
 Items ⌘I  
 Patrons ⌘L  
 Search ⌘K  
 Orders  
 Budgets  
 Vendors  
 Subscriptions  
 Routes

**Show Dictionary Window**

Alexandria users will be pleased to discover that Alexandria contains a built-in, on-line dictionary. You may open the Alexandria's dictionary server by selecting **Dictionary Window** from the Alexandria standard **Show** drop-down menu.

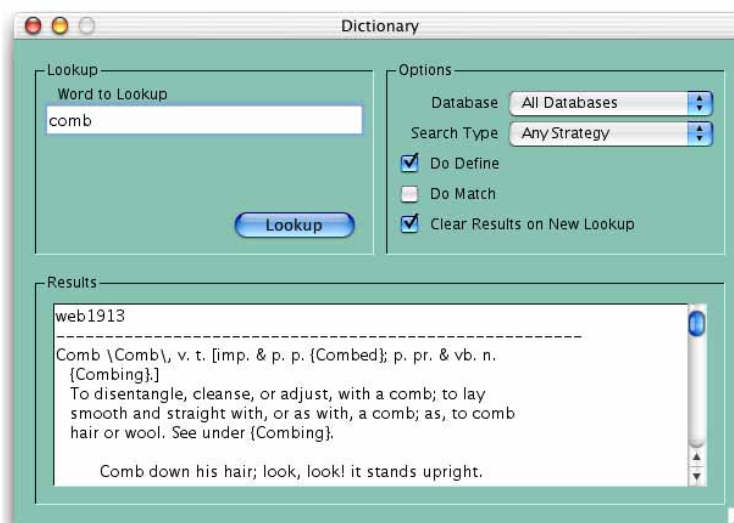
**Server Connection**

This field contains one default dictionary server: “miranda.org.” If there are additional dictionary servers you would like to add, remove, or edit, double-click in the **Server Connection** portion of the **Dictionary** window. An **Add Server** window will appear, allowing you to **Add**, **Remove**, or **Edit** any of the provided dictionary servers.

If the dictionary server you are trying to access requires a username and password, check the **Requires Authentication** box. Checking this box will make two previously grayed out fields available: **Username** and **Password**. If that information is required in order for you to connect to the selected (highlighted) dictionary server, provide that information in these fields.

Select (highlight) the dictionary server you would like to connect with from the **Server Connection** field located on the left side of the page. Click on the **Connect** button when you are ready to log into a specified dictionary server.

When you have successfully connected to the selected server, a window similar to the one below will appear. It is in this window that you can set search parameters, perform your search, and receive search results.



## Lookup

**Word to Lookup**—In this field, type in the word you would like to search for. Using the checkboxes contained in the **Options** section of the **Dictionary** window, you can search for a word definition or for an exact match (spelling). When you are ready to have your search performed, click the **Lookup** button.

Your text may not include spaces or special characters (i.e. ! % \$ #).

## Options

**Database**—The information provided in this drop-down menu is retrieved from the specified dictionary server. Each server will include it's own database search options. Therefore, using this drop-down menu, select the search method that you would like to have performed.

**Search Type**—Again, the information provided in this drop-down menu is retrieved from the specified dictionary server. Each server will include it's own search type options. Therefore, using this drop-down menu, select the search type that you would like to have performed.

**Search Definitions**—By checking this box, any searches that are performed will return *word definitions* to the **Results** section of the **Dictionary** window. This is the **Dictionary** window's default search option; when it is selected, the **Exact Match** search option (located directly below it) will be grayed out.

**Exact Match**—By checking this box, any searches that are performed will return an *exact match* to the **Results** section of the **Dictionary** window. You may also use this search option if you are unsure about the spelling of a particular word; just enter your best approximation and several varieties (including, hopefully, the correct one) will be returned. When **Exact Match** is selected, the **Search Definitions** search option (located directly above this one) will be grayed out.

**Clear Search Results on New Lookup**—If you would like your old search results to be cleared from the **Results** section of the **Dictionary** window with every new word **Lookup**, check this box.

## Results

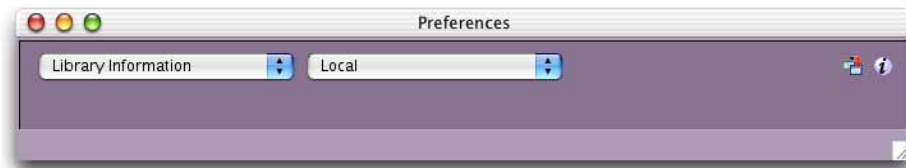
This portion of the **Dictionary** window will display any **Exact Match** or **Search Definitions** search results. If you would like this section of the **Dictionary** window cleared with every new search, mark the **Clear Search Results on New Lookup** box located directly above this field.



## Introduction to Preferences

**Preferences** are used to customize Alexandria to meet your library's specific needs. You can customize security settings, colors, sounds, default values for barcodes, settings for cataloguing, and restrictions for **Alexandria Researchers** and **Workstations**.

With **Preferences** you can also configure your library policies (i.e. the rules that dictate how your library is used). You can set policies that determine how each item in your collection circulates and how certain patron types are allowed to use your library. You can also configure policies that determine how long an item can be checked out to a patron, how long a hold request can be kept, and so forth.



### Edit

Can't Undo	Ctrl+Z
Can't Redo	Ctrl+Shift+Z
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Clear	
Select All	Ctrl+A
Speak Text	
Find	Ctrl+F
Find Again	Ctrl+G
Paste From File	
Preferences	Ctrl+;

The top portion of every preference window consists of two drop-down menus and two standard Alexandria buttons. The drop-down menu on the left is the **Preference** selection menu. Use this menu to shuffle through Alexandria's various preference windows. For more information on an individual Alexandria preference window, please review its corresponding chapter in this User's Manual.

The drop-down menu on the right is the **Local / Default Local / Global** menu. For more information on **Global / Local** preferences, please see page 63.

On the far top-right of every preference window are two Alexandria standard buttons. The first button is a preference specific **Restore Defaults** button. This button will restore Alexandria preference windows to their original, factory settings; reinstating any information or fields that were supplied via registration codes.

The second button is the Alexandria standard **Help** button. For more information on how to use this button, please review page 40 of the **Alexandria Basics** chapter.

The preference chapters that follow this one will describe, in detail, each preference window and then demonstrate how to use them.

To set up or change Alexandria preferences, you must first activate the **Preferences** window from the **Edit** menu. You may also use the "Ctrl+;" (Windows) or "Cmd+;" (Macintosh) shortcut command. Once the **Preferences** window appears, click on the drop-down menu in the upper-left corner of the window to view your available preferences.

✓ Administration
Advanced Bookings
Alexandria Researcher
Archive
Calendars
Checkpoint LSI
Circulation
Display Settings
Item Management
Library Information
Orders
Patron Management
Policies
Routes
SIF
Sounds
Web
Word Processor

## Alexandria Preferences

The following is a summary of all available Alexandria preferences. The remaining preference chapters will describe each preference in detail.

Please keep in mind that certain preferences will not be available for certain clients. An Alexandria Data Station will have more available preferences than will a Librarian Workstation. However, a Librarian Workstation will have more than a Researcher Workstation. Some preferences will only become active after you have licensed them (e.g. **Advanced Web**, **Advanced Bookings**). If you have not licensed a particular feature, the corresponding preference will not appear in the **Preference** drop-down menu (shown to the left).

**Administration**—Set up users and access levels; activate passwords. Configure address books for wide-area or multi-collection access (see “*Administration Preferences*” on page 65).

**Advanced Bookings**—Only available for those who have licensed the Advanced Bookings module. This feature is documented in the Advanced Bookings chapter (see “*Advanced Bookings*” on page 87).

**Alexandria Researcher**—Define initial settings for your Alexandria Researchers (see “*Alex Researcher Preferences*” on page 93).

**Archive**—Alexandria will automatically create a copy of your data at pre-determined times throughout the week (see “*Archive Preferences*” on page 99).

**Authority Control**—This preference is used to configure local authority controls for Alexandria (see “*Authority Control Preferences*” on page 101).

**Calendars**—Set up calendars for use in your library. Calendars are used to schedule open days, closed days, period due dates and notes (see “*Calendar Preferences*” on page 103).

**Checkpoint ILS**—Used to enhance the SIP2 protocol. It should only be enabled if Checkpoint SIP2 hardware is in use (see “*Checkpoint ILS Preferences*” on page 107).

**Circulation**—Configure information about temporary barcodes and determine how often the transaction log is saved. Create text for inclusion in the body of patron notices (see “*Circulation Preferences*” on page 109).

**Display Settings**—Choose color schemes for Alexandria’s appearance and individual window settings (see “*Display Settings Preferences*” on page 117).

**Item Management**—Configure information about library items, such as: barcode ranges, barcode leaders, default policies, terminology, and catalogue settings (including leading articles to automatically ignore). See “*Item Management Preferences*” on page 121 for more information.

**Library Information**—Configure general information about your library (see “*Library Information Preferences*” on page 127).

**Orders**—Set defaults for the **Orders Management** window (see “*Orders Preferences*” on page 133).

**Patron Management**—Configure information about library patrons, such as: barcode ranges, barcode leaders, default policies, and terminology (see “*Patron Management Preference*” on page 137).

**Policies**—Set guidelines for library operation (see “*Policy Preferences*” on page 141).

**Routes**—Add default settings for your routes (see “*Routes Preferences*” on page 153).

**SIF**—Enables and configures the **Schools Interoperability Framework** agent (see “*SIF Preferences*” on page 155).

**Sounds**—Assign Alexandria sounds for events such as check out, check in and program shutdown (see “*Sounds Preferences*” on page 163).

**Web**—Determine settings for Alexandria Web (see “*Web Preferences*” on page 165).

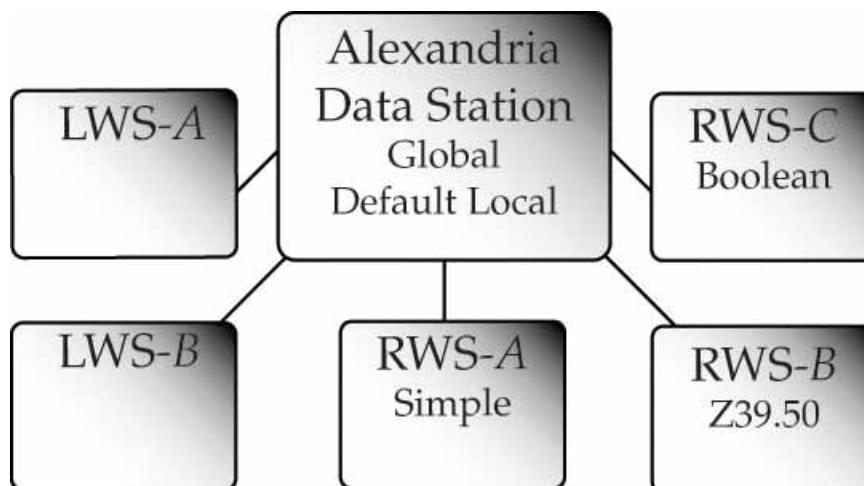
**Word Processor**—Add default settings for new word processor documents (see “*Word Processor Preferences*” on page 171).



## Global vs. Local Preferences

Alexandria users are able to switch between **Global**, **Local**, and **Default Local** preference settings.

**Global** and **Default Local** preferences are saved and stored on the Alexandria Data Station. For this reason, in the diagram below, the Data Station contains the words **Global** and **Default Local**. After installation, any **Local** preference information you configure on a LWS or RWS will be saved and stored to *that* individual client workstation only.



In the diagram above, there are two Librarian Workstations (LWS) and three Researcher Workstations (RWS) connected to the main Alexandria Data Station.

To reiterate, **Local** preferences basically start out the same as **Default Local** preferences and can later be overridden “locally” (i.e. on the individual client workstation).

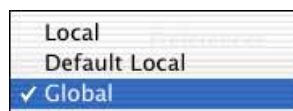
For instance, in the example above, *Researcher Workstation-A* has their **Local Alexandria Researcher** preference set to **Simple Search**. *Researcher Workstation-B* has their **Local Alexandria Researcher** preference set as **Z39.50** and *Researcher Workstation-C* has been set up to use the **Boolean** search interface as default.

In the same way, *Librarian Workstation-A* can have a different local color scheme, different sound events, forced authority control options, or word processor defaults than *Librarian Workstation-B*.

Users with the appropriate **Administration** permissions (*see page 65*) can access and change the Data Station’s **Global/Default Local** preferences using a remote client (e.g. a Librarian Workstation). If changes are made to the **Global/Local** preferences, the Data Station will immediately broadcast those changes to all connected clients.

### - N O T E -

Any changes that are made to the **Global/Default Local** preferences from a remote client (e.g. via Researcher or Librarian workstation) will be saved and stored on the main Alexandria Data Station.

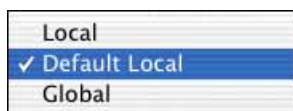


**Global**—Alexandria’s **Global** preferences are configured and stored on the Alexandria Data Station. However, users may also configure **Global** preferences remotely, using an Alexandria client (e.g. Librarian or Researcher workstation) that has been accessed by someone with administrator privileges.

The **Global** preferences on the Data Station will be the same Global preferences for every single client (i.e. workstation) that’s connected to your Data Station.

Hence, any changes you make to your Data Station’s Global preferences will automatically (and instantly) change the **Global** preferences for every client within your Alexandria system network.

For example, the **Circulation** preference’s temporary barcode range will be exactly the same on all the computers throughout your district.



**Default Local**—When you install a new Alexandria client (Researcher or Librarian), they will automatically import the **Default Local** preferences from the Data Station. However, these preferences can later be overridden on a machine-by-machine basis. This is accomplished by adjusting the **Local** preferences (described below) of an individual workstation. Any client machine’s **Local** preferences will automatically override its **Default Local** preferences, but only for the machine whose **Local** preferences were changed.

Like **Global** preferences, **Default Local** preferences are configured and stored on the Alexandria Data Station. However, they too can be remotely configured on an Alexandria client that has been accessed with administration privileges.

The **Default Local** preferences on the Data Station will be the same **Default Local** preferences for every single client (i.e. workstation) that’s connected to your Data Station. Hence, any changes you make to your Data Station’s **Default Local** preferences will automatically (and instantly) change the **Default Local** preferences for every client within your Alexandria system network.

Changes to the **Default Local** preferences will only affect an Alexandria client machine (e.g. workstation) if it doesn’t have any **Local** preference overrides established.



**Local**—These preferences are “local” meaning that they can override the **Default Local** preferences of an individual Alexandria client workstation (i.e. Librarian or Researcher).

**Local** preferences were created in response to the needs of a “local” environment, where each client workstation in an Alexandria library system could be set up differently to reflect different needs. For example, your library might set up three Researcher Workstations, all with different default search interfaces and color schemes.

Don’t worry about filling in every field in the **Local** preference windows; especially if you’ve already filled in most of the pertinent, static information in the Data Station’s **Default Local** preferences. Just supply information to the fields where you would like to elicit individual change. Alexandria workstations will automatically download any missing **Local** information from the Data Station’s pre-defined **Default Local** preferences.

Unless they’re the Data Station’s own **Local** preferences, **Local** preferences are not configured or stored on the Data Station. All **Local** preferences will be stored on the individual client machine and will not update any other client workstation connected to your Alexandria Data Station.



# Administration Preferences

## Global Administration Preferences

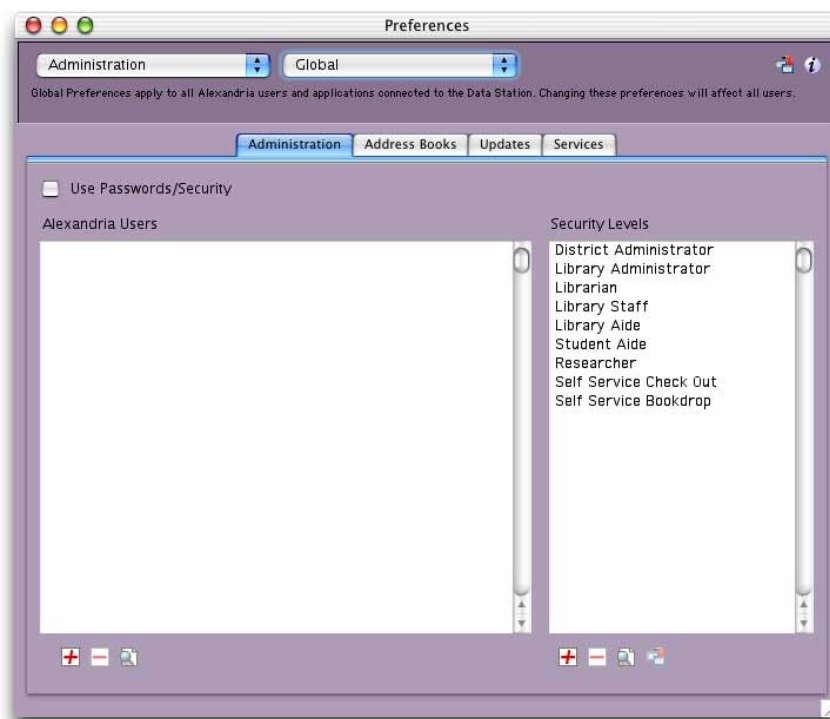
There are no available **Local** or **Default Local Administration** preferences.

## Administration Tab

Use this preference to assign users their appropriate access levels. A user's access level determines what Alexandria operations the user is allowed to perform.

Many access levels, from **District Administrator** to **Researcher** are available. **District Administrator** is the least restrictive and allows unlimited access to Alexandria preferences and settings. **Researcher** is the most restrictive access level, only allowing the ability to search. Alexandria also allows users to create their own custom security levels by choosing from a list of permissions (*see page 69 for more information*).

Until you set up an **Administrator** name, Alexandria will launch with full administrative privileges. The **Administrator** is the only access level that lets you set up new Alexandria users. Once you've established an **Administrator** name, if no other security level is selected, **Researcher**-level access will be the default upon launch.



If **Use Passwords/Security** is checked, you may select **Restart** or **Log Out** from the **File** menu to access Alexandria with a different access level.

The **New User**, **Remove User**, and **Edit User** buttons set up, remove, and change Alexandria users. To edit an existing user's information, double-click on a user's name from the **Alexandria Users** field. You can create any number of Alexandria users, each with their own unique (or identical) security level. While you may have users with duplicate security levels, you cannot have duplicate user names.

<b>File</b>	
New Document	Ctrl+Shift+N
Open	Ctrl+O
Close Window	Ctrl+W
Close All	Ctrl+Alt+W
<hr/>	
Save	Ctrl+S
Save As Text	Ctrl+Alt+S
Save As	
<hr/>	
Revert	
<hr/>	
Import	
Export	
Utilities	
<hr/>	
Page Setup	
Print	Ctrl+P
<hr/>	
Log Out	Ctrl+Shift+Q
Restart	Ctrl+Shift+E
<hr/>	
Exit Alexandria	Ctrl+Q

## Activating Security

Check the **Use Passwords / Security** box on the **Administration** preference window to activate the security features of Alexandria. The default setting for new libraries is **OFF**. When this box is checked and user passwords have been created, Alexandria will require a username and password when launching the program. To immediately activate (or when activating for the first time) Alexandria's password security, you should select **Restart** from the **File** menu.

The username, entered during registration, is recorded to the **Transaction log**.

## Accessing Alexandria as a Different User

Sometimes you may need to access Alexandria as a different user so that you have permission to perform certain tasks. For example, if you setup a **Librarian Workstation** for use by a **Student Aide**, you may need to log in as the **District / Library Administrator** to do a task the **Student Aide** does not have authorization for.

To access Alexandria with a different user name than the one you launched the program under, choose **Restart** or **Log Out** from the **File** menu. When the **Log In** window appears, enter the appropriate **Username** and **Password** and click **Log In** to access Alexandria.



Make sure that the **Use Passwords/Security** checkbox is marked in the **Global Administration** preferences window (see the Activating Security section above).

## Adding Users

Click the **New User** button (or <command+N> Macintosh, <Ctrl+N> Windows) to add a new user to Alexandria. The following window will appear, requesting specific new user information.

District Administrator  
Library Administrator  
Librarian  
Library Staff  
Library Aide  
Student Aide  
✓ Researcher  
Self Service Check Out  
Self Service Bookdrop

**Add User**

Username

Password

Confirm Password

Email Address

Level

Finger Print

Enter the username, password<sup>1</sup>, confirmation password, email address, and then select the **Level** for the new user. If you have not previously added any users, the **Level** drop-down menu will be set to **District/Library Administrator** and you will not be able to change it. Once you add a **District/Library Administrator**, you can add other new users with different access levels.

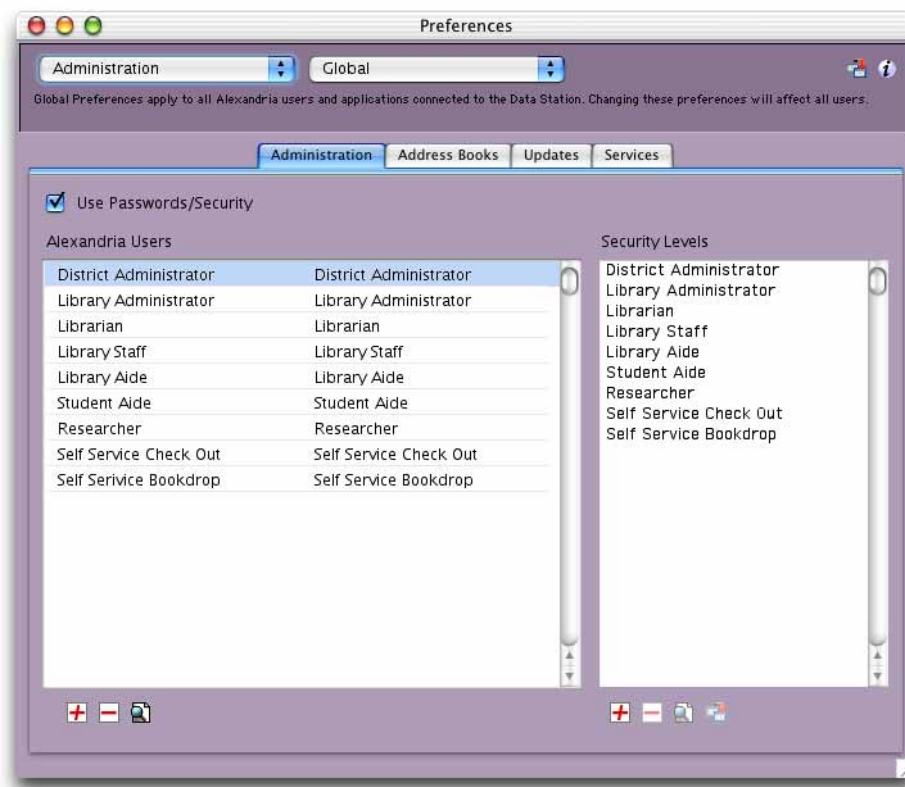
The **District Administrator** security level is only meaningful for multi-library collection licenses (WAN, etc.); for all other licenses, it behaves the same as the **Library Administrator**.

If you have Alexandria-supported fingerprint software/hardware installed, you may scan an administrator/user fingerprint as an additional security measure. Future versions of Alexandria will be able to use fingerprint identification to login to Alexandria without the worry of revealing secret passwords. See page 188 for further information on the benefits of fingerprint security.

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1. Passwords are *not* case sensitive. Upper and lower case characters match.

When you click the **OK** button, the new user name will appear in the **Alexandria Users** field of the **Administration** preference window.



## Removing Users

To remove a user from Alexandria, select (highlight) a user from the **Alexandria Users** field of the **Administration** preference window and click the **Remove User** button.

## Edit Users

You may edit the username, password, email address, security level, and fingerprint identification of any existing Alexandria user. Clicking the **Edit User** button opens a window similar to the **Add User** window (described on the previous page). Here, you may change any of the user fields. If your only existing user is a **District/Library Administrator**, you will be unable to change their security access level until you have an additional **District/Library Administrator**.

## Security Levels

Below are the default security levels available within Alexandria.



**District Administrator**—Full access to every control and setting within Alexandria, including the ability to examine and change registered users. For multi-library collection licenses, users at this level can edit district level preferences and have access to all library preferences. All other access levels can only modify records from their assigned library collections.

**Library Administrator**—Full access to every control and setting within Alexandria, including the ability to examine and change registered users. For multi-library collection licenses, users at this level can only edit preferences for their assigned collection.

**Librarian**—Full access to every control and setting within Alexandria except the ability to examine registered users and **Address Books**.

**Library Staff**—Access to all system functions and reports except **Preferences**, **Import** and **Utilities**.

**Library Aide**—Access to Alexandria **Researcher** capabilities and standard circulation commands, with the authority to allow restricted actions. For example, if a patron has too many books issued, a warning message appears when the patron tries to check out another book. With this access level, the library aide can override the message and allow the patron to check out another book.

**Student Aide**—Access to Alexandria **Researcher** capabilities and standard circulation commands, but no authority to allow restricted actions. See the above description of **Library Aide** access for information about restricted actions.

**Researcher**—Access to **Bulletin Board** and **Search** under the **Show** menu. The **Reports** menu is disabled. **Preferences** under the **Edit** menu are disabled. **Import** and **Utilities** under the **File** menu are disabled. The **Circulation** menu and **Circulation** window commands are disabled.

**Self-Service Check Out**—Supports **Researcher** privileges with the addition of **Check In** and **Bookdrop** circulation commands (see “Modes, Commands and Help” on page 228).

**Self-Service Bookdrop**—Supports **Researcher** privileges with the addition of the bookdrop capability—**Circulation** window allowed for **Bookdrop** mode only (see “Modes, Commands and Help” on page 228). At this level, overdue fines are automatically recorded with no opportunity to accept payment, or forgive/adjust fines. Fines are still displayed in the transaction log.

**NOTE:**

Only the **District Administrator** can add custom or edit existing security levels.

- District Administrator
- Library Administrator
- Librarian
- Library Staff
- Library Aide
- Student Aide
- ✓ Researcher
- Self Service Check Out
- Self Service Bookdrop

## Adding, Editing, and Removing Custom Security Levels

Users with the appropriate authority can add or edit any of Alexandria's security levels with the exception of the **District Administrator** security level, which has permissions for every feature within Alexandria.



**Add**—This button opens the **Security Level Edit Window**. This window allows users to create their own custom security levels. Enter the name for the new security level in the **Security Level Name** field.

Clicking on any permission in the **Permissions** section of the **Security Level Edit Window** will enable or disable that option for the newly created security level. The blue **Enable All** icon located to the bottom left of the window activates all permissions. The red **Disable All** icon located next to it will disable all permissions.

When you have finished creating your own custom security level, click **OK** to save the new security level or **Cancel** to discard it.

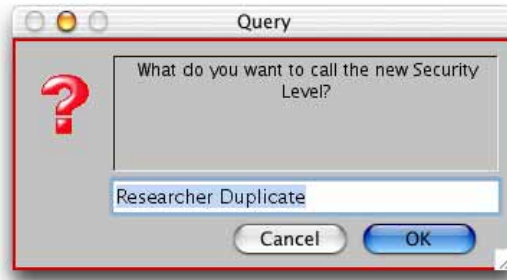
**Remove**—Users with the appropriate authority can remove a customized security level by highlighting (selecting) the level from the **Security Level** portion of the **Global Administration** preference window's **Administration** tab and clicking the **Remove** button. Users will *not* be able to remove any of Alexandria's nine default starting security levels.

**Edit**—This button opens the **Security Level Edit Window**. This window allows users to edit any existing security levels. Users are able to change the name of any existing security level, even those of Alexandria's default starting nine.

Clicking on a permission in the **Permissions** section of the **Security Level Edit Window** will enable or disable that option for the existing security level. The blue **Enable All** icon located to the bottom left of the window activates all permissions. The red **Disable All** icon located next to it will disable all permissions.

When you have finished editing your existing security level, click **OK** to save your changes or **Cancel** to discard them.

**Duplicate**—If you would like to duplicate an existing security level and it's list of enabled and disabled security options, select (highlight) the **Security Level** to be duplicated from the **Global Administration** preference window's **Administration** tab and click the **Duplicate** button. A **Query** window, similar to the one shown below, will appear asking what to name your newly duplicated **Security Level**. From this point on, you may treat the newly duplicated security level as you would any existing security level; it may be edited, it's name changed, or it may be completely removed from the system.





## Global Administration Preferences

There are no available **Local** or **Default Local Address Book** preferences.

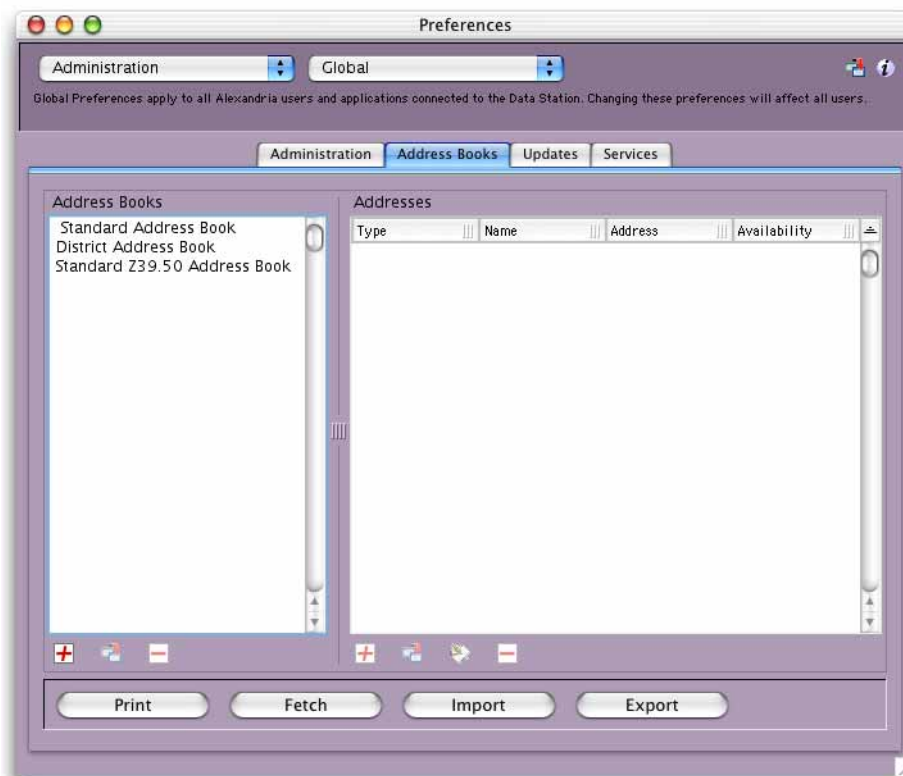
### Address Books Tab

**Address Books** allow your Librarian or Researcher Workstations to communicate with other Alexandria Data Stations in your district. With the optional Z39.50 or wide-area network (**WAN**) feature of Alexandria, you are granted access to these interconnected library collections. If your Data Station has only one collection and you don't have a wide-area or central union license, you don't need to set up any address books—Alexandria defaults are set to the recommended configuration.



#### NOTE:

In order to host or use wide-area access (WAN), you must purchase a wide-area network license. Once you purchase this license, all your Researcher Workstations can search outside collections. Authorized workstations with a wide-area network license will also be able to search yours.



#### - N O T E -

The **Global Address Book** preference is only available to users with a **District Administrator** security level.

Every Data Station has an address book called the **Standard Address Book**. This address book contains all the titles that are inventoried at your library. You *may not* edit or move the **Standard Address Book**.

You can specify which address book to use as default for your Researcher Workstations (see "Global Researcher Preferences" on page 98). Each Researcher Workstation can be further customized to individually search specific address books.

On the Researcher workstation, the local collection is always shown at the top of the list followed by groups and individual entries (listed in order of entry). If you don't want an address book to be shown, select **Hide on Researcher** or **Hide Everywhere** from the **Availability** drop-down menu when you **Add** or **Edit** an Alexandria **Address Book**.



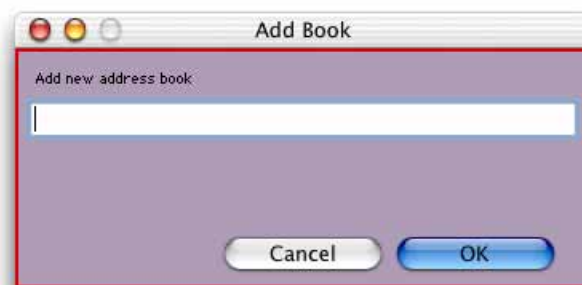
## Adding New Address Books

You may add as many different address books as you need to manage your library collections. Since you can specify which address books your Researcher Workstations will use by default, additional address books can be used for more extensive searches. Click on the **New** (“+”) button under the **Address Books** field to add a new address book.

Your library collection is automatically contained within the **Standard Address Book**. Although Alexandria 5.4.4 no longer supports the term “groups,” address books may now contain other address books. You can add additional Data Stations to an address book by dragging them from an address book’s **Addresses**<sup>1</sup> field and dropping them onto another **Address Book** field—or you add them manually, one at a time, using the instructions below.

### How to Create a New Address Book

Using the **Address Books** tab of the **Administration** preference window, you can create an address book (which can then contain a group of Data Stations). When a patron searches for an item under a selected address book (treated as a group), all Data Stations in that address book are searched. This makes it easy for patrons to search multiple collections. For example, you could select an address book containing every high school in the district, or every high school within a certain zip code.



To create a new address book, do the following:

- Step 1. Click the **Add Book** (“+”) button on the bottom-left of the **Address Book** preference window or <Cmd+N> on Macintosh, <Ctrl+N> on Windows.
- Step 2. Enter the name of the address book you want to add.
- Step 3. You can now add addresses to your newly created address book by following the subsequent instructions.

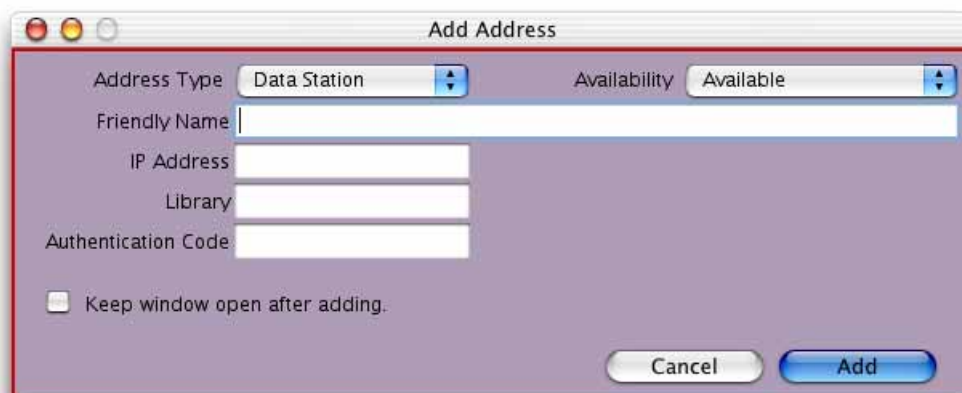
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1. When you drag an address from one address book to another, the address is *always* copied. If you want an address removed from an address book, use the **Remove** button.

- ✓ Data Station
- Z39.50 Site
- FTP Site
- Web Site
- District Librarian
- Embedded Book

## Adding Addresses to an Address Book

- Step 1. Highlight (by clicking) an address book name in the **Address Book** field for which you'd like to add a new address. The **Address Book** field is located on the left-hand side of the **Address Books** preference tab.
- Step 2. Click the **Add Address** button ("+" ) located below the **Addresses** field of the **Administrator** preference window's **Address Books** tab.
- Step 3. The **Add Address** window will appear (shown below):



- Step 4. From the **Add Address** window, choose the type of address you'd like to add from the **Address Type** drop-down menu. Your **Add Address** field options will be dramatically different depending on the **Address Type** you choose. These different **Address Types** will be documented throughout the remaining pages of this chapter.

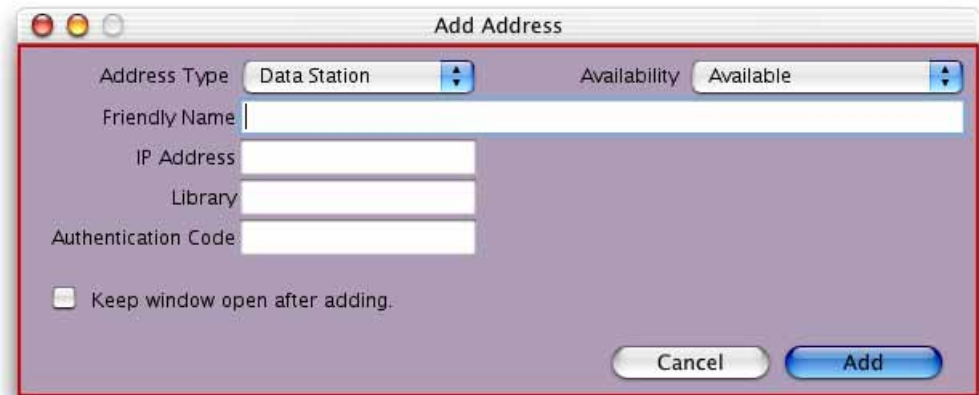
Note: Some **Address Types** may not be available if your data is not registered for a particular feature or module (e.g. Z39.50).

- Step 5. If you are going to be adding additional addresses after you have finished the one you are working on, check the **Keep window open after adding** box.
- Step 6. Keep adding addresses to your address book as necessary. Click **OK** when you are done, or **Cancel** to close the **Add Address** window without applying your changes.
- Step 7. Once all **Address Book** changes have been made, click the **OK** button. Then, click the **Save** button to save all changes or **Revert** to undo all changes.

☒ Data Station  
Z39.50 Site  
FTP Site  
Web Site  
District Librarian  
Embedded Book

☒ Available  
Hide on Researcher  
Hide Everywhere

## Data Station Addresses



**Address Type**—Choose **Data Station** as the type of address you’d like to add from the **Address Type** drop-down menu. Your **Add Address** field options will be dramatically different depending on the **Address Type** you choose.

**Availability**—This drop-down menu allows the user to determine whether they want this address to be available to everyone, hidden from any connected Researcher Workstation, or hidden from everyone altogether.

**Friendly Name**—Name your new address book in the **Friendly Name** field (such as Central Library or My Data Station).

**IP Address**—Use the **IP Address** field to input the IP address of the machine to which you are trying to connect. Leave it blank if you only want to search your local collection.

**Library Code**—When searching an address, results can be restricted to a specific library code, which can be entered in this field.

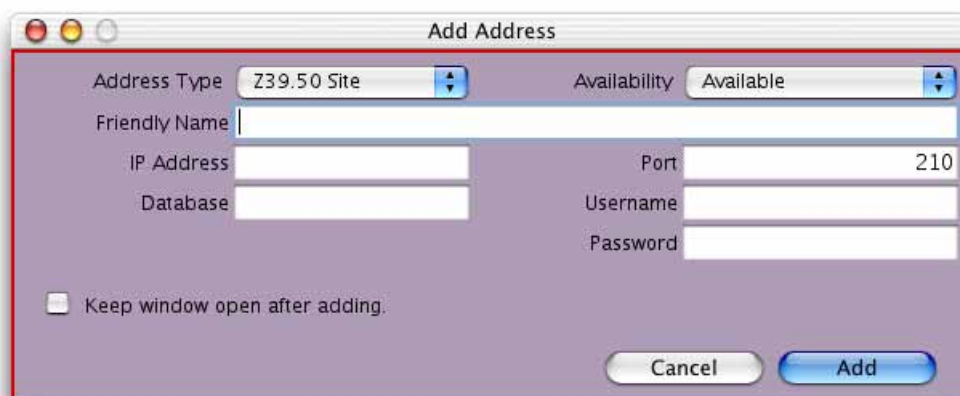
**Authentication Code**—An **Authentication Code** is an optional added level of security for Alexandria users. If you only want pre-determined Data Stations connecting to your Data Station’s library collection, you can require them to have an **Authentication Code** that you create, and enter it in this field. This code may be changed at any time and *must* match the Data Station’s **Authentication Code** in order to search the indicated Data Station or library.

**Keep window open after adding**—If you are going to be adding multiple **Data Station** addresses, check this box to keep the **Add Address** window open after you have successfully added an address.

## Z39.50 Addresses

☒ Data Station  
Z39.50 Site  
FTP Site  
Web Site  
District Librarian  
Embedded Book

☒ Available  
Hide on Researcher  
Hide Everywhere



**Address Type**—Choose **Z39.50** as the type of address you'd like to add from the **Address Type** drop-down menu. Your **Add Address** field options will change dramatically depending on the **Address Type** you choose.

**Availability**—This drop-down allows the user to determine whether they want this address to be available to everyone, hidden from any connected Researcher Workstation, or hidden from everyone altogether.

**Friendly Name**—Name your new address book in the **Friendly Name** field (such as Central Library or My Data Station).

**IP Address**—Use the **IP Address** field to input the IP address of the library server to which you are trying to connect.

**Database**—Users will be routed to the Z39.50 database that they have indicated in this field.

**Port**—This is the port required by Alexandria in order to successfully search the indicated Z39.50 database. Default is 210.

**Username** and **Password**—Some Z39.50 servers will require a username and password. If they are required and you know them, provide them in the allotted spaces.

**Keep window open after adding**—If you are going to be adding multiple **Z39.50 Site** addresses, check this box to keep the **Add Address** window open after you have successfully added an address.

✓ Data Station  
Z39.50 Site  
FTP Site  
Web Site  
District Librarian  
Embedded Book

✓ Available  
Hide on Researcher  
Hide Everywhere

## FTP Site Addresses

Create a list of FTP sites that users can use to upload and download library data.



**Address Type**—Choose **FTP Site** as the type of address you'd like to add from the **Address Type** drop-down menu. Your **Add Address** field options will change dramatically depending on the **Address Type** you choose.

**Availability**—Allows the user to determine whether they want this address to be available to everyone, hidden from any connected Researcher Workstations, or hidden from everyone altogether.

**Friendly Name**—Name your new address book in the **Friendly Name** field (such as Central Library or My Data Station).

**IP Address**—Input the IP address to which you'd like to connect. An FTP address is similar to an *http://* (web site) or *IP* address, except it uses the prefix *ftp://* instead of *html://* and can be any combination of letters and numbers (e.g. "*ftp.companioncorp.com*").

**Path**—This is the FTP server directory into which you will connect. This path varies between different FTP servers. Having the wrong FTP path is one of the most common connection errors. If you get an error message when trying to connect, be sure to check your FTP path.

**Username** and **Password**—These fields are required to access the FTP server. These are set up by the FTP server administrator.

**Keep window open after adding**—If you are going to be adding multiple **FTP Site** addresses, check this box to keep the **Add Address** window open after you have successfully added an address.

✓ Data Station  
Z39.50 Site  
FTP Site  
Web Site  
District Librarian  
Embedded Book

✓ Available  
Hide on Researcher  
Hide Everywhere

## Web Site Addresses

Librarians can create **Web Site** address books to provide students with specific links to material they might be interested in.



The screenshot shows a window titled "Add Address". It contains two dropdown menus: "Address Type" with "Web Site" selected, and "Availability" with "Available" selected. Below these are two text input fields: "Friendly Name" and "URL". At the bottom left is a checkbox labeled "Keep window open after adding." At the bottom right are two buttons: "Cancel" and "Add".

**Address Type**—Choose **Web Site** as the type of address you'd like to add from the **Address Type** drop-down menu. Your **Add Address** field options will change dramatically depending on the **Address Type** you choose.

**Availability**—Allows the user to determine whether they want these websites available to everyone, hidden from any connected Researcher Workstations, or hidden from everyone altogether.

**Friendly Name**—Name your new address book in the **Friendly Name** field (such as Central Library or My Data Station).

**URL**—Supply your uniform resource locator (URL) web address into this field (e.g. "http://www.goalexandria.com").

**Keep window open after adding**—If you are going to be adding multiple **Web Site** addresses, check this box to keep the **Add Address** window open after you have successfully added an address.

☒ Data Station  
 Z39.50 Site  
 FTP Site  
 Web Site  
 District Librarian  
 Embedded Book

☒ Available  
 Hide on Researcher  
 Hide Everywhere

## District Librarian Addresses

This option appears in the drop-down menus of District Librarian Workstations. Clients can use it to switch between various Alexandria Data Stations.

**Address Type**—Choose **District Access** as the type of address you’d like to add from the **Address Type** drop-down menu. Your **Add Address** field options will change dramatically depending on the **Address Type** you choose.

**Friendly Name**—Name your new address book in the **Friendly Name** field (such as Central Library or My Data Station).

**IP Address**—Input the IP address of the server you’d like to connect with (e.g. “ftp.booksareus.com” or “105.150.01.233”).

**Library**—When searching address books, results can be restricted to a specific library copy collection code, which are configured in this field.

**Authentication Code**—An **Authentication Code** is an optional added security level for Alexandria users. If you only want specific Data Stations connecting to your library’s IP address, you can require them to have an **Authentication Code** that you create and enter in this field. This code may be changed at any time and *must* match on both sides in order for outside users to be able to search the indicated Data Station or library.

**Username and Password**—If the Data Station you are trying to connect to has **Use Passwords/Security** checked, the District Librarian will not be able to access these Data Station’s without a valid **Username** and **Password**. These fields will automatically log you in with the security level required for that Data Station.

**Availability**—Allows the user to determine whether they want this address to be available to everyone, hidden from any connected Researcher Workstation, or hidden from everyone altogether.

**Keep window open after adding**—If you are going to be adding multiple **District Librarian** addresses, check this box to keep the **Add Address** window open after you have successfully added an address book.

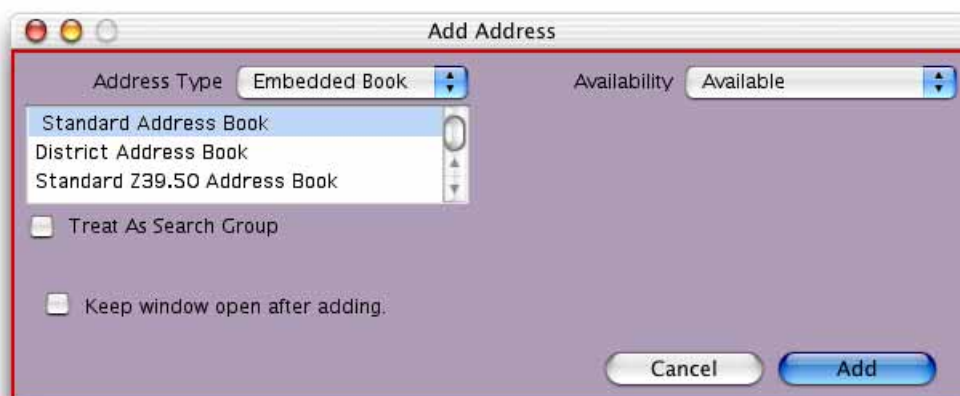


✓ Data Station  
Z39.50 Site  
FTP Site  
Web Site  
District Librarian  
Embedded Book

✓ Available  
Hide on Researcher  
Hide Everywhere

## Embedded Book Addresses

**Embedded Book** addresses can be used two ways. Users can drag and drop address books into other address books to create “submenus.”



**Address Type**—Choose **Embedded Book** as the type of address you’d like to add from the **Address Type** drop-down menu. Your **Add Address** field options will change dramatically depending on the **Address Type** you choose.

**Availability**—Allows the user to determine whether they want this address to be available for everyone, hidden from any connected Researcher Workstations, or hidden from everyone altogether.

**Treat As Search Group**—If you have **Treat As Search Group** checked, then searches are performed across *all* the Data Stations contained within the address book fields (including submenus and groups).

**Keep window open after adding**—If you are going to be adding multiple **Embedded Book** addresses, check this box to keep the **Add Address** window open after you have successfully added an address book.



### Duplicating An Address Book

Select (highlight) an address book in the **Address Books** field by clicking on it once. Once an address book has been selected (highlighted), click on the **Duplicate Address Book** button located near the bottom of the **Address Books** field. A **Duplicate Book** window will appear. Specify a name for your duplicate address book and click **Ok**. Your duplicated address book will appear in the **Address Book** field.

### Copying An Existing Address to an Address Book or Group

If an address has already been entered into an address book, you can copy it into another address book by selecting (highlighting) it and dragging it from the **Addresses** field and dropping it onto an address located in the **Address Books** field.

### Editing a Data Station in an Address Book or Group

Edit an address book in the **Address Books** field by double-clicking on it. You are only allowed to change the names of non-system address books. A window will appear asking for you to supply a new name. You will be unable to change the name of system address books.

### Removing a Data Station from an Address Book

To remove an address book, select (highlight) one from the **Address Books** field by clicking on it once. You may click the **Remove** button (“-”) on the bottom-right hand side of the **Address Books** field. A message will appear, asking if you’re sure you want to remove the selected book. Click **Yes** if you are sure and **No** if you are uncertain. Once you have finished, press **Save** to keep the changes or click **Revert** to undo them.

### Duplicating an Address

Select (highlight) an address from the **Addresses** field by clicking on it once. Once an address has been selected (highlighted), click on the **Duplicate Address** button located near the bottom of the **Addresses** field. A **Duplicate Address** window will appear. Specify a name for your duplicate address and click **OK**. The new address will appear at the bottom of the **Addresses** field.

### Editing an Address

Edit an address from the **Addresses** field by double-clicking on it. You may also edit an address by selecting (highlighting) one from the **Addresses** field and clicking on the **Edit Address** button, located near the bottom of the **Addresses** tab. Make the changes you desire, then click **OK** to keep the changes or press **Cancel** to restore them to their previous settings.

### Removing an Address

To remove a specific address, select (highlight) the corresponding address book from the **Address Books** field by clicking on it once. You may then select (highlight with a click) the address you want removed from the **Addresses** field and click the **Remove Address** (“-”) button, located on the bottom-right hand side of the **Address** field. Press **Save** to keep the changes or click **Revert** to restore the deleted address.

## Other Address Book Commands

**Print**—This button will create a printable list of all pertinent **Address Book** information, including address types, friendly names, ports and IP addresses.

**Fetch**—This button allows Data Stations to download and import address books from other Data Stations contained within the district.

**Import**—This button opens an operating system standard explorer window, allowing users to import COMPanion *.axd* address book export files. Once you have directed Alexandria to the location of your data file, you may import it by double-clicking on it or selecting (highlighting) it and clicking **Open**. If an existing address book’s name matches an imported one, you will be asked if you would like to **Create** a **New** book, **Merge** the two books, or **Overwrite** the existing book.

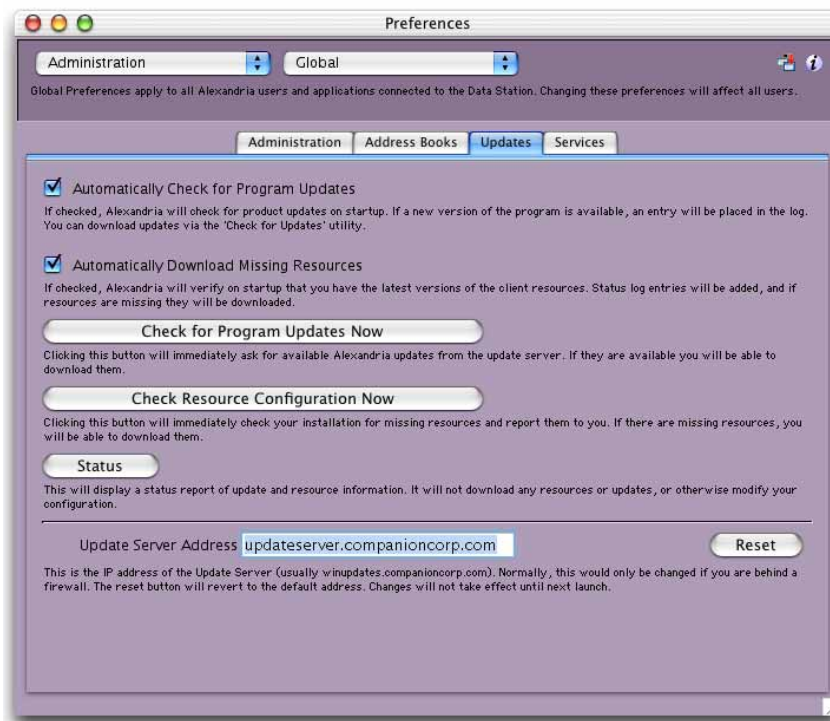
**Export**—This button allows users to export all their Alexandria address books or just a few selected ones. When the export window appears, select whether you would like **All** or just a few **Selected** address books to be exported. Next, direct the **Export File As** window to the location where you would like your export file saved. Your exported file will be saved in the COMPanion standard *.axd* format and can then be imported into Alexandria systems using the **Import** command described above.

## Global Administration Preferences

There are no available **Local** or **Default Local Updates** preferences.

### Updates Tab

Alexandria can be updated automatically over the world wide web. For convenience, larger organizations may license the use of an Alexandria **Update Server**.



**Automatically Check for Program Updates**—If this box is checked, Alexandria will automatically check for product updates on start-up. If a newer version of the program is available, an entry will be placed in the log. You can download updates via the **Check for Updates** utility.

**Automatically Download Missing Resources**—If this box is checked, Alexandria will automatically verify on start-up that you have the latest versions of the client resources. Status entries will be added to the log, and if any resources are missing, they will be automatically downloaded.

**Check for Program Updates Now**—Clicking this button will immediately ask for available Alexandria updates from the update server. If they are available, you will be able to download them.

**Check Resource Configuration Now**—Clicking this button will immediately search your installation for any missing resources. If you are missing resources, you will be able to download them.

**Status**—This will display a status report of update and resource information. It will not download any resources or updates, or modify your configuration in any way

**Update Server Address**—This is the IP address of the Alexandria Update Server (usually `updateserver.companioncorp.com`). Normally, this will only be changed if you are behind a firewall. The **Reset** button will revert to the default update server address. Changes will not take effect until Alexandria has been restarted.

## Performing Software Updates

There are two ways you can perform software updates within Alexandria. If you have an internet connection, you can check for Alexandria updates from COMPanion's server. If you use **File, Utilities, Check For Updates**, and an update is available, a description of the update is shown under the **Get Read-Me** selection. From there, you can choose to update your Alexandria Data Station or wait for a future date. If you are sure you want to update to the newest version of Alexandria, an easier method is to use the **Updates** tab in the **Administration** preference window under **Edit, Preferences**. This utility is only available for the Data Station; Librarian Workstations do not offer this selection.

You can also download the newest COMPanion and Alexandria software updates from the official website ([www.goalexandria.com](http://www.goalexandria.com)). Just follow the **Products** and **Software Updates** hyperlinks. You must enter your Alexandria registration name, email address, school/company and serial code in order to proceed with the download.

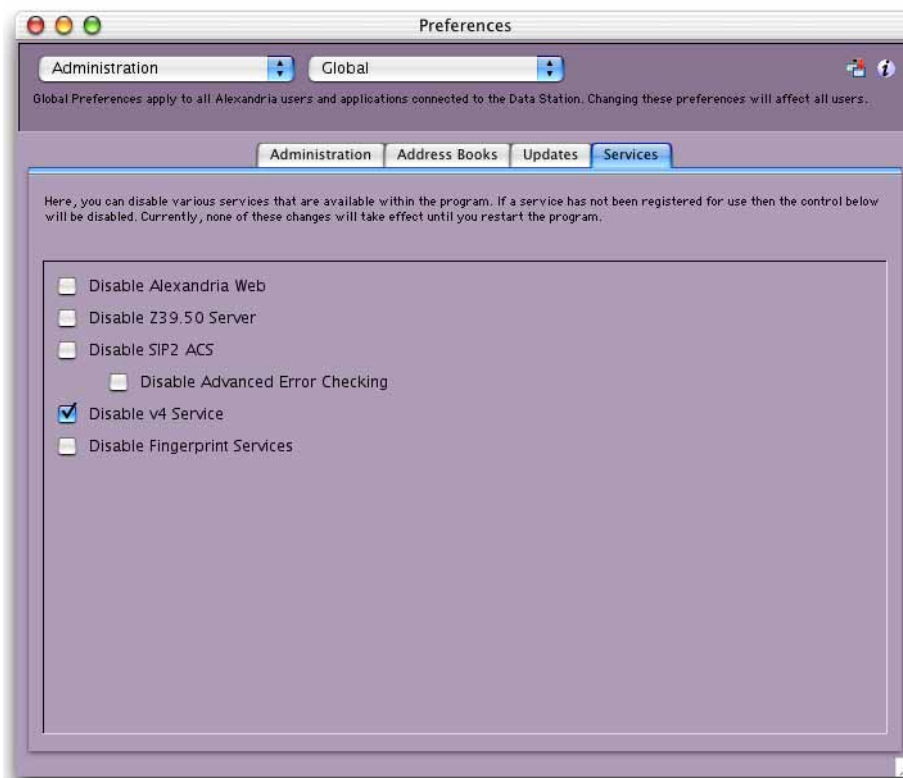
If you don't have an internet connection (or are unable to download the newest updates), you can contact COMPanion (via email or Tech Support) and request an Alexandria Update CD-ROM be sent to your location.

## Global Administration Preferences

There are no available **Local** or **Default Local Services** preferences.

### Services Tab

This preference allows the **District** or **Library Administrator** to disable registered Alexandria services.



Only the services that you've licensed can be enabled (or disabled). If they are not licensed, they will appear as grayed-out. Changes will not take effect until Alexandria has been restarted. Default settings enable all licensed services.

There are some services you may want to take special note of:

**Disable Alexandria Web**—This will disable/enable Alexandria's **Web** services (i.e. **Web** and **Advanced Web**).

**Disable Z39.50 Server**—When this box is checked, your Alexandria Data Station cannot be used as a Z39.50 server and remote Data Stations will not be able to search your collection.

**Disable SearchALL Server**—When this box is checked, the **SearchALL** search feature of **Alexandria Web** will be disabled.

**Disable SIP2 ACS**—Checking this box will disable Alexandria's Standard Interchange Protocol's Automated Circulation System.

**Disable Advanced Error Checking**—This should only be checked if the SIP2 hardware doesn't use checksum validation. Enabling this when unnecessary will cause Alexandria not to work with the SIP2 hardware.

**Disable v4 Service**—Allows Alexandria v4 clients to connect to v5 Data Stations. Default is disabled. Only activate this service if absolutely necessary.

**Disable Fingerprint Service**—Available to enable/disable only if a fingerprint capture device is attached to the computer.

**Run Alexandria as a Service**—This option automatically launches Alexandria and runs it in the background every time your computer started. Users will be unable to access program menus or make changes to patrons or items while Alexandria is running as a service. You will need to deactivate the service and then re-launch Alexandria in order to access your library data. Running Alexandria as a service does not take effect until you restart your computer. Unless you are absolutely sure you want Alexandria to run as a service, *do not* select this option.

This option is specific and will only appear on **Windows 2000, NT, and XP** machines.

# Advanced Bookings

This chapter describes Alexandria's **Advanced Bookings** feature, available as a separately priced Alexandria module.

## - N O T E -

**Advanced Bookings** is an optional feature of Alexandria. You must have purchased an **Advanced Bookings** license in order to use this feature.

Advanced Bookings greatly enhances Alexandria's reservations capabilities and is valuable when managing centralized media centers that process hundreds of requests each day. When you purchase the **Advanced Bookings** module, two distinct changes will be made to Alexandria:

1. The **Advanced Bookings** preference will be activated. As part of the **Advanced Bookings** enhancement, this preference allows administrators to customize reservation notices and email settings.
2. Two new selections will appear at the bottom of the **Circulation** system drop-down menu. These selections (**Advanced Booking** and **Process Pending Books**) provide users with advanced capabilities of the **Advanced Bookings** option.

**Advanced Bookings** will also affect each of these Alexandria preferences: Policies, Calendars, Circulation, Library Information, Alexandria Web (if purchased), and Alexandria Researcher (if used).

To use **Advanced Bookings**, place a reservation as you normally would. Patrons can place their own reservations, or librarians can place them at a central location.

The library administrator will run the **Advanced Bookings** process once a day. They will also run the **Process Pending Bookings** function to "catch" bookings that could not be processed.

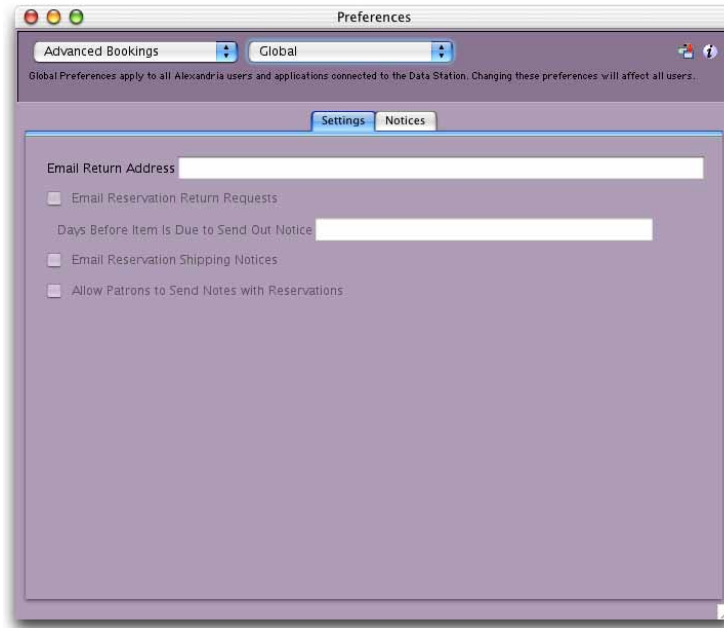
## Global Advanced Bookings Preferences

There are no available **Local** or **Default Local Advanced Booking** preferences.

The **Advanced Bookings** preference window is located under the **Edit, Preferences** menu only after you have purchased an **Advanced Bookings** license.

## Settings Tab

This preference window covers general **Advanced Bookings** settings in Alexandria.



**Email Return Address**—Alexandria uses the supplied email address for all Advanced Bookings email notifications.

**Email Reservation Return Requests**—Check this box to automatically send notification to patrons who have items checked out, reminding them of when they're due back.

**Days Before Item is Due to Send Out Notices**—Sets how many days before the item's due date to send out the message indicated above.

**Email Reservation Shipping Notice**—Check this box if you want to automatically send email notification to users that their item reservation is in route to them. When selected, Alexandria will send an email notification for each reservation checked out to a patron. This email will contain the **Reservation Shipping** text you created in the **Advanced Bookings Notices** preference window.

**Allow Patrons to Send Notes With Reservations**—When this box is checked, a **Reservation Note** field will appear on both the **Alexandria Web** and on the Researcher Workstation's **Hold** or **Reservation** window. Any note that a patron provides in this field will be entered into the transaction log.



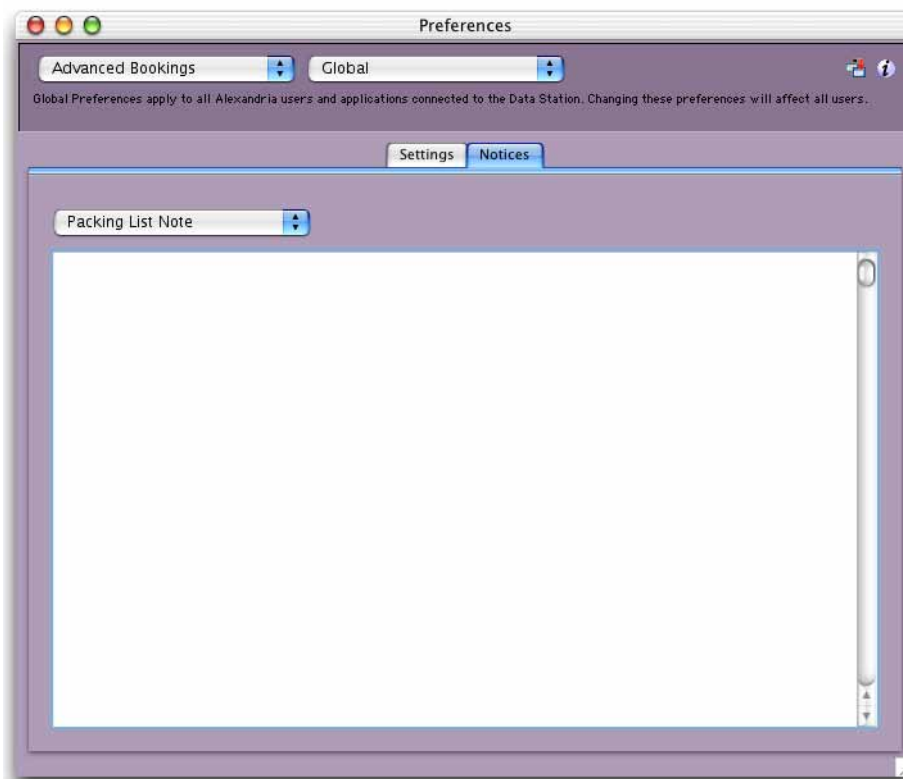
- ✓ Administration
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## Global Advanced Bookings Preferences

There are no available **Local** or **Default Local Notices** preferences.

### Notices Tab

This preference allows Administrators to customize the text used on various booking notices. If you click the **Restore Default** button, Alexandria's **Advanced Bookings** default notice is restored.



**Packing List Note**—This note is placed at the top of the **Advanced Bookings** packing list. It is entirely up to you to customize. Default is blank.

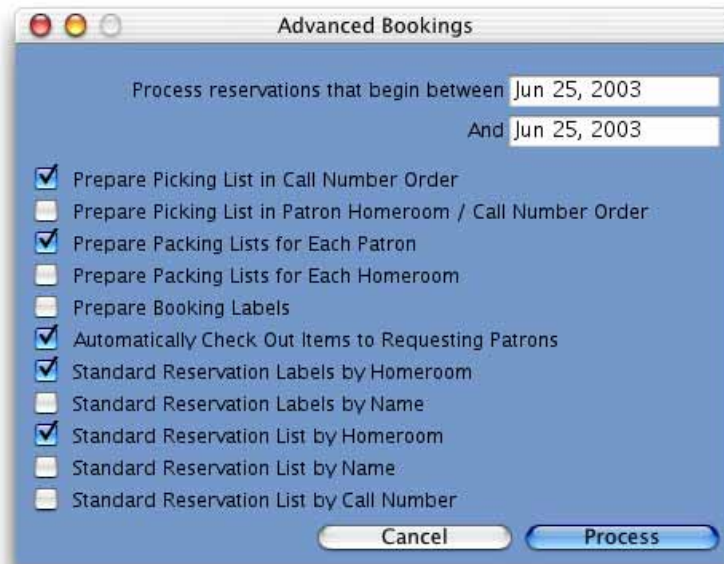
**Reservation Return Request**—This notice is used in the body of the **Reservation Return Request** notification. When email notification is turned on, these requests are automatically sent via email. Default is: "This item will be due soon. Please return it to the library."

**Reservation Placed**—This notice is used in the body of the notification sent to patrons who have placed reservations. Default is: "Your reservation has been placed."

**Reservation Shipping**—This notice is used in the body of the notification sent to patrons who have reservations pending. This notice is sent out when a reservation has been filled. Default is: "Your reservation is being shipped."

## Advanced Bookings

Every day that reservations begin, the administrator will select **Advanced Bookings** from the **Circulation** menu. Observe the window below.



**Advanced Bookings** will process reservations that begin *on* or *between* the dates selected. In order for Alexandria to know that items have been returned, all returned items must be checked in before they are put away. Use Alexandria's **Bookdrop** function to return items.



### NOTE:

Reports are prepared based on reservation requests. Once an item has been checked out to a patron, it will not appear in these reports.

Check the desired boxes and click the **Process** button to begin. Once the process has completed, reports can be examined, saved, and/or printed. If you're unsure about what reports you need, prepare them all until you find one that works best for you.

**Prepare Picking List in Call Number Order**—This option prepares a list of reservations in call number order. Use this list to quickly retrieve items from your collection.

**Prepare Picking List in Patron Homeroom/Call Number Order**—This option prepares a list of reservations by patron location, call number order then by patron. This report is useful for large operations where more than one person may be filling orders. It also helps with sorting reservations for delivery.

**Prepare Packing Lists for Each Patron**—This option prepares a packing list for each patron with reservations between specified dates. If customers often place reservations on several items, packing lists help make sure each patron receives their requested items. The packing list also contains a **Packing List Note**, configured in the **Advanced Bookings preference** window.

**Prepare Packing Lists for Each Homeroom**—This option prepares a packing list for each patron location. Each location begins on a new page and is then further sorted by patron. Central sites can then collect items for shipping to common locations.

**Prepare Booking Labels**—This option prepares booking labels; attached to each item shipped. Standard Alexandria labels are supported to reduce confusion and cost. Booking labels are prepared in this three-across format:

**Address Label — Item Info — Patron Info**

**NOTE:**

Run **Reservation Reports** under **Circulation Reports** before you run Advanced Bookings with the **Automatic Check Out** option selected.

Booking labels are used to address items for delivery to requesting patrons. Each row of labels contains unique information. The first label contains delivery information (i.e. patron, location, and address).

The second label contains item information, call number, barcode number, barcode image, reservation begin/end dates. The third label contains patron information, name, location, barcode number, barcode image, item barcode number, item reservation begin/end dates.

**Automatically Check Out Items to Requesting Patrons**—When selected, Alexandria automatically checks out each available reservation to the appropriate patron.

Once a reservation has been checked out, it's no longer a reservation; it becomes loaned. Alexandria doesn't differentiate between items that have been loaned via reservation, walk in, satisfied hold, or any other way items can be borrowed.

If Alexandria checks out a copy reservation that *should* be in inventory but can't be located (overdue, for instance), then an alternative copy will be used if one is available. If no other copies can be located, then a warning window will appear and a note will be made to the transaction log.

If these exceptions happen frequently, another way to process reservations is to print out all reports, and once items are physically allocated to a patron, check them out using Alexandria's standard circulation commands (*see "Reservations Check Out, by Item" on page 237*).

**Standard Reservation Labels by Homeroom**—This option will print standard reservation labels (by homeroom) for each reservation within a specified date range.

**Standard Reservation Labels by Name**—This option will print a standard reservation label (by name) for each reservation within a given date range.

**Standard Reservation List by Homeroom**—This option will print standard reservation lists by homeroom within a specified date range.

**Standard Reservation List by Name**—This option will print standard reservation lists by name within a specified date range.

**Standard Reservation List by Call Number**—This option will print standard reservation lists by call number within a specified date range.

## Exceptions Happen, What Can We Do?

With any automated process, things can always go wrong. The following section addresses these exceptions.

If the item is *not* available at the time of processing or the system shows the requested copy is not available for reservation, the previous patron may not have returned it. Or perhaps it was returned, but not checked in.

In any event, Alexandria doesn't know anything other than the item is not available.

If an item is unavailable when your lists are prepared, Alexandria will indicate all unavailable items. When you run the **Process Pending Bookings** command, Alexandria checks to see if any of the unavailable items have recently become available. If they have, they're automatically assigned to the requesting patron.

If an item doesn't become available and no alternatives are located, there is nothing Alexandria can do but wait. The reservation will remain pending until its end date; after which, it's removed by the system.

Another problem occurs when an item is not located at the time of reservation. Alexandria thinks the item is available, but it's not. This will only be discovered when someone tries to locate the physical item for the requesting patron. The item could be misfiled, lost, or borrowed without checkout. In any case, the item should be checked in so that the requesting patron isn't responsible for returning something they never received; then the item should be declared **Lost** so that other patrons will not place reservations on it. Hopefully, an alternative selection can be located for the patron.

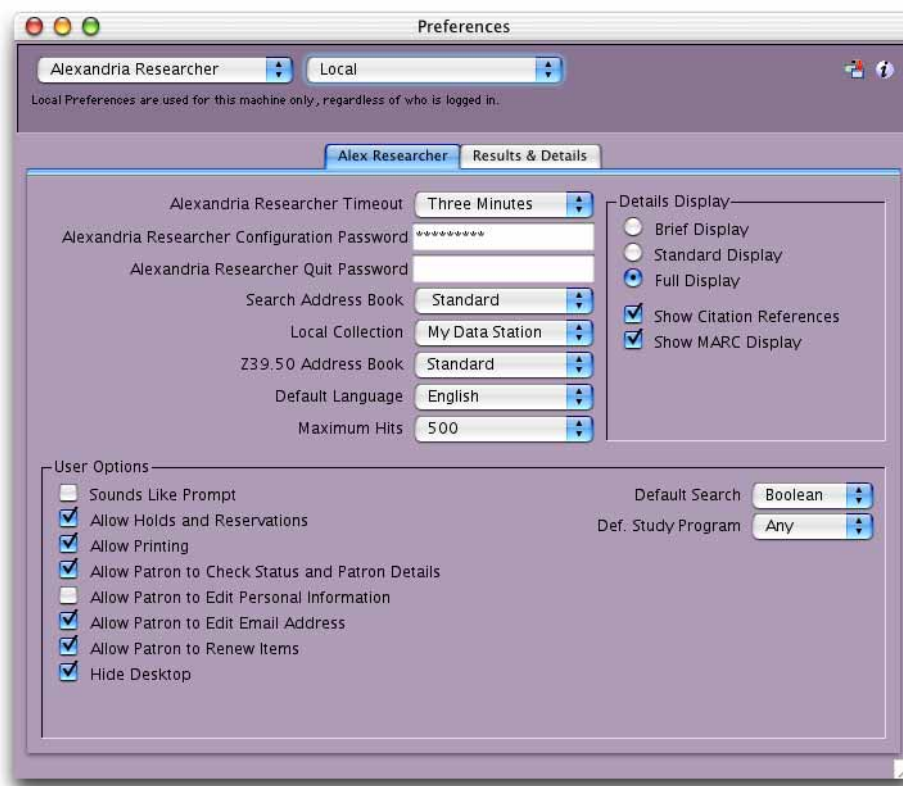
# Alex Researcher Preferences

## Local Researcher Preferences

The **Alexandria Researcher** preferences contain **Local**, **Default Local**, and **Global** preference selections.

## Alexandria Researcher Tab

Use these preferences to set your local **Alexandria Researcher Workstation** defaults.



Unless overridden in an individual Researcher Workstation's "local" preferences, the **Alexandria Researcher Default Local** preferences will be used as default for every Researcher Workstation connected to the Data Station. If you change these settings locally on any given Researcher (i.e. by using the **Local** preferences), these preferences will be changed *only* for that workstation.

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- Alexandria Researcher
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**Alexandria Researcher Timeout**—You can select the number of minutes it takes for the Alexandria Researcher to time out. If a patron abandons the workstation, the screen will contain their research until this counter runs out and resets the window to its initial state. The default setting is **Three Minutes**.

Thirty seconds before resetting, a warning window will appear, allowing the patron to cancel the reset. If the patron fails to respond, the reset will occur as scheduled. If the patron cancels the reset, the timer is started over.

If you do not wish the Alexandria Researcher Workstation to reset when idle, select **Never** from this drop-down menu.

**Alexandria Researcher Configuration Password**—This password restricts a patron's access to **Preferences** on an Alexandria Researcher. If no password is entered, Alexandria Researcher preferences can be configured on a workstation-by-workstation basis. If a password is set in this field and a patron selects **Preferences** from the **Edit** menu in an Alexandria Researcher, a window appears, asking the patron to enter this password. If the user does not know this password, the user cannot change preferences on the Alexandria Researcher. The default password is "Configure".

**Alexandria Researcher Quit Password**—Enter a password in this field to restrict patrons from quitting Alexandria Researcher. If a password is set in this field and the patron chooses **Quit** or **Log Out** from the **Edit** menu on an Alexandria Researcher, a window appears, asking the patron to enter this password. There is no default password, thus allowing all users to close an Alexandria Researcher.

**Search Address Book**—This drop-down menu lets you select the default address book that will be used for a Researcher Workstation. The default selection is always the **Standard Address Book**.

**Local Collection**—This drop-down menu lets you select the default collection that an Alexandria Researcher Workstation will search.

**Z39.50 Address Book**—This drop down menu allows you to select the default Z390.50 server used during a Z39.50 search on an Alexandria Researcher.

**Default Language**—This setting allows you to set the language used when the Researcher Workstation starts up or is reset. The default is set by your activation code; in America it's set to **English**.

**Maximum Hits**—Specifies the maximum number of titles to return during a search. Default is 500.

## User Options

These settings determine what actions a user may perform from an Alexandria Researcher Workstation.

**Sounds Like Prompt**—Check this box if you want a message to appear when a search finds no matches. The message will remind the patron of the **Sounds Like** search, which sometimes finds matches when other searches do not. The default setting is OFF.

Click **OK** to start a **Sounds Like** search or **Not Now** to return to the search window.

**Allow Holds and Reservations**—Allows patrons to place hold requests or make reservations from an Alexandria Researcher Workstation. Users have to enter their barcode number and password to place a hold or reservation. The default setting is ON.

**Allow Printing**—Allows patrons to print from an Alexandria Researcher Workstation. Generally, you'll allow printing for patrons outside the library and then customize Researcher Workstations within the library to disable printing. The default setting is ON.

**Allow Patron to Check Status and Patron Details**—This checkbox allows patrons to check their status from Alexandria Researchers. The patron status report includes information about what items they have checked out, on hold, and reserved. If this setting is enabled, patrons will be able to change their own password. The default setting is ON.

**Allow Patron to Edit Personal Information**—Allows patrons to be able to modify their home address and the phone number. The default setting is ON.

**Allow Patron to Edit Email Address**—Allows patrons to be able to modify their email address. The default setting is ON.

**Allow Patron to Renew Items**—Allows patrons to be able to renew items they have checked out. The default setting is ON.

**Hide Desktop**—Hides the operating system desktop on an Alexandria Researcher Workstation. This keeps users from accessing other applications located on the computer operating system desktop. The default setting is ON.

**Default Search**—This drop-down menu sets the default search interface. This is the search interface that patrons will see when performing a library catalogue search. The default setting is **Simple**.

**Default Study Program**—This drop-down menu sets the default study program when patrons perform a study program search. The default setting is **Any**.



## Details Display

These settings determine the amount of detail displayed for a search on an Alexandria Researcher Workstation. You can select one of three display types; you may also show citation references and MARC records. In order to view any changes you may have made to your display, the Researcher Workstation must be restarted.

**Brief Display**—Shows only minimal title information.

**Standard Display**—Shows all useful title information. This is the default setting.

**Full Display**—Shows *all* title information, which is sometimes more than most patrons will need to see.

**Show Citation References**—Shows citation references for creating quick bibliographies. Default is ON.

**Show MARC Display**—Shows a hyperlink to the title's MARC record. Default is OFF.

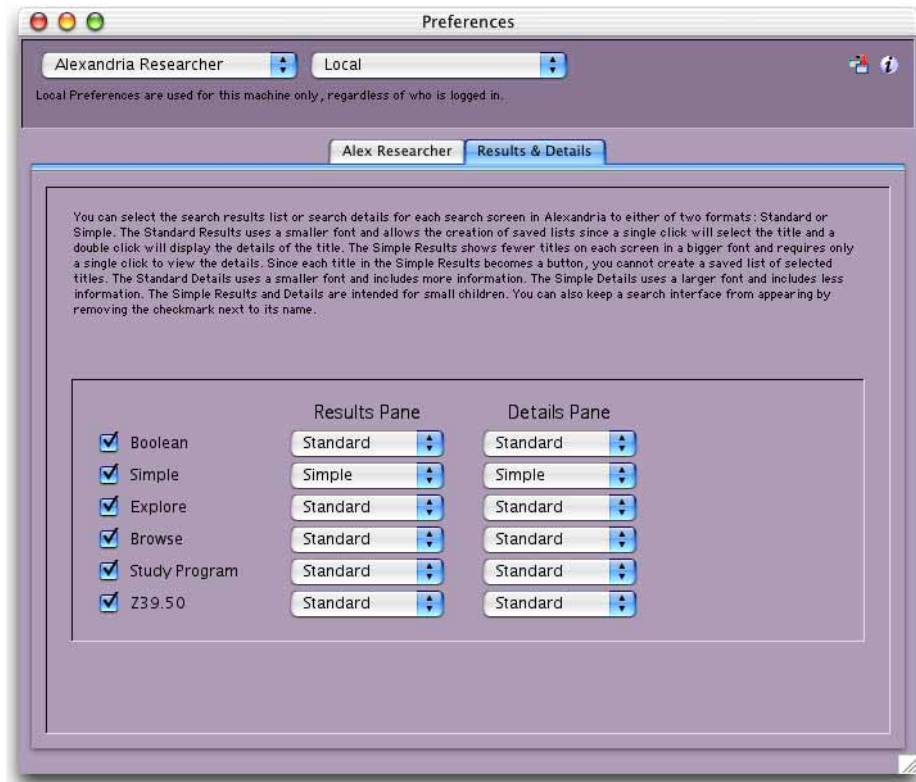
**Display Maximum User Errors**—This preference will only be available to users with a limited user license. Since users with full site licenses have no limits on connected Workstations, to them, this option will not be shown as available. If the box is checked, however, and the Data Station has met its maximum user limit, notes will be placed in the transaction log detailing any client refusals that take place.

## Local Researcher Preferences

The **Alexandria Researcher** preferences contain **Local**, **Default Local**, and **Global** preference selections.

### Results & Details Tab

Users can select how search results are displayed for every individual search windows in Alexandria. You have two search formats: **Standard** or **Simple**.



**Standard Results** uses a smaller font and allows the creation of saved lists since a single-click will select the title and a double-click will display the full details of the title.

**Simple Results** show fewer titles on each window in a bigger font and requires only a single-click to view the item details.

Since each title in **Simple Results** becomes a button, you cannot create a saved list of selected titles. **Standard Details** uses a smaller font and includes more information. The **Simple Results** and **Details** are intended for small children.

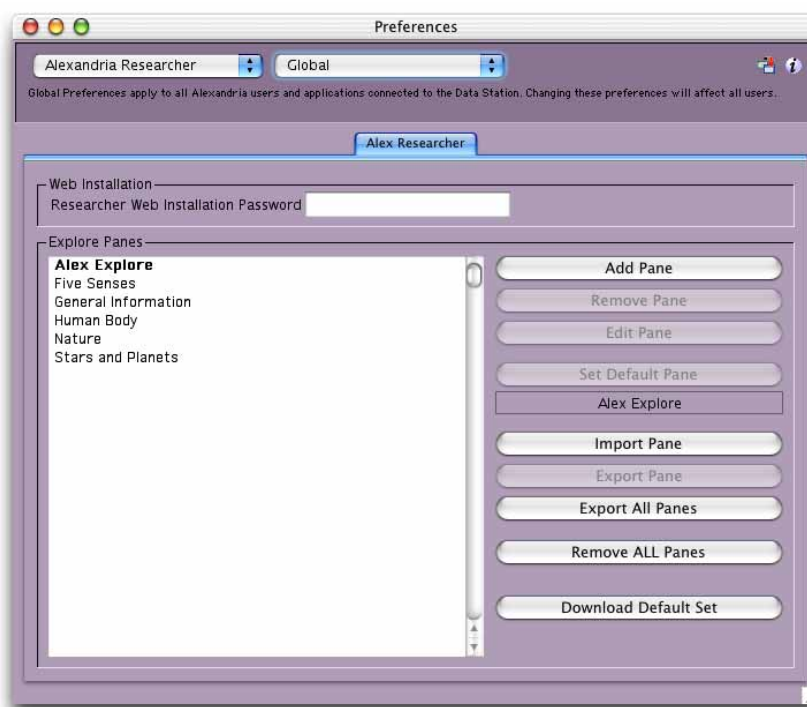
You may also keep any type of search interface from appearing by removing the checkmark next to its name. Please note, removing this checkmark will disable this search interface!

## Global Researcher Preferences

If you are not registered for **Alexandria Explore**, the **Global Alexandria Researcher** preference tab will not be available for configuration.

## Alexandria Researcher Tab

If you've purchased the **Alexandria Explore** option, an **Explore** tab will appear in the **Alexandria Researcher Global** preference window. This tab allows you to fully configure the **Explore** interface. To fully configure your **Alexandria Explore** interface, please see the "Alexandria Explore" on page 321.



**Researcher Web Installation Password**—If you set a password in this field, it will be required when you attempt to install an Alexandria Researcher Workstation over the world wide web. If you decide to leave this field blank, users need only click **OK** on the web installation page (without specifying a password) to install a Researcher Workstation.

The **Alexandria Explore** interface consists of a series of panes that contain several icons/ buttons. Each icon has a text label and an action associated with it. The text label is shown below each icon and actions are performed when the icon is clicked.

When you license **Alexandria Explore**, you receive a fully configured iconic interface with sample icons you can use to create your very own interface. To create an interface for your library you can:

- Remove the sample panes and start with a clean slate. Build the entire interface from scratch by yourself.
- Use the sample interface as a starting point, and then customize it to meet your library's specific needs.
- Import a ready-made **Alexandria Explore** interface created by someone else.
- Import panes created by someone else and use them to quickly configure your own custom interface.
- Do any combination of the above.

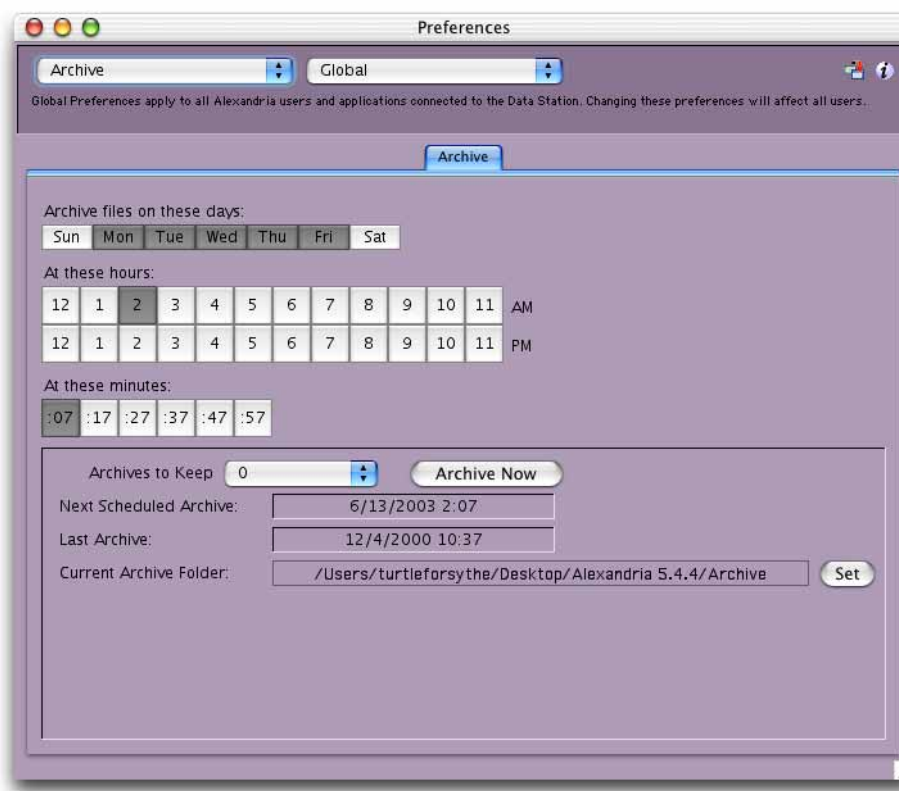
# Archive Preferences

## Global Archive Preferences

There are no available **Local** or **Default Local Archive** preferences.

## Archive Tab

The **Archive** window allows you to schedule automatic backup copies of your valuable Alexandria Data. The default settings are **Mon, Tue, Wed, Thu & Fri** at **11PM** at “:47” minutes after the hour. This default keeps **three** backups inside the **Archive** folder, which is located in your **Alexandria** shared system support folder



When it's time for an archive, all information in the **Data** folder is copied to a subdirectory in the **Archive** folder. During archiving, all library services on the Data Station are disabled.

Although you can disable the automatic archiving function, this is *not* recommended. Your most recent archives (combined with your off-site backup) are invaluable in securing the safety of your very valuable data (*see page 4 for more information*).

### - N O T E -

The Data Station must be turned on and running when you have the archive scheduled to take place. Thus, if librarians don't want to leave their computers running overnight, they should change the default time(s) that the program is set to archive.



# Authority Control Preferences

## Local Authority Control Preferences

There are no available **Global Authority Control** preferences.

## Authority Control Tab

Use this preference to configure which field types that Alexandria will **Authority Control**. For more information on how to use Alexandria's **Authority Control**, please review the **Authority Control** chapter, starting on page 221.



## Force Individual Authority Controls

By placing checkmarks next to the information field names (e.g. **Series**, **State**, **Grade**), users are selecting which fields that they would like Alexandria to authority control. If one of these information fields has been checkmarked and a user tries to <ctrl-tab> out of that information field, they may discover that it's authority-controlled. The actions that take place when a field is authority-controlled depend on the **Authority Control Window Updates** option you have selected (see "Authority Control Window Updates" on page 102).

Use the **Disable** and **Enable All** buttons to enable/disable all the possible fields that Alexandria can authority control.

## Authority Control Window Updates

**Never update authority controlled information**—Any changes made to information in the **Authority Control** window will not affect your data.

**Ask before updating authority controlled information**—Alexandria will ask permission before making any changes to corresponding authority-controlled data

**Automatically update authority controlled information**—Alexandria will automatically make changes to corresponding authority-controlled data.

**Update Authority Control records on import**—When importing data into Alexandria, all authority-controlled fields within the import record are automatically updated.

Users should take special note that this option will *not* ask you for update confirmation on selected import records. So unless you explicitly trust all of your **Authority Control** entries, you should *not* select this option.



# Calendar Preferences

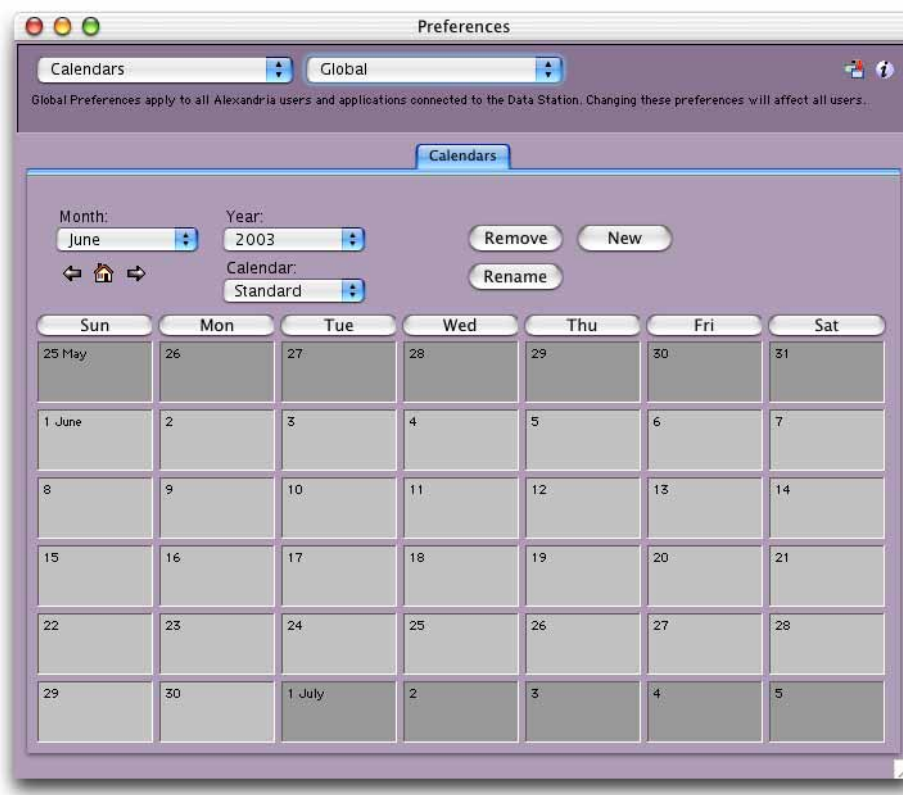
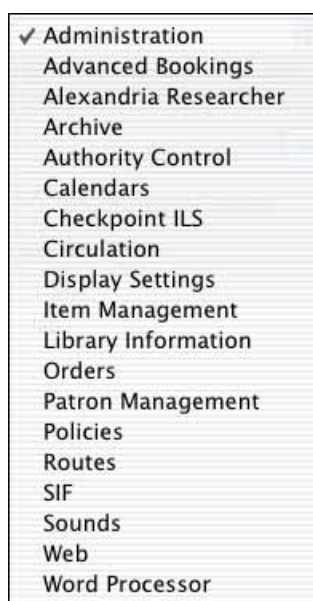
## Global Calendars Preferences

There are no available **Local** or **Default Local Calendar** preferences.

## Calendars Tab

Use this preference to create custom calendars for your library.

You can assign a separate calendar to each patron or circulation policy. This lets you set up calendars for groups of patrons who may be operating on different school levels and/or schedules.



The month and year of the current calendar are shown in the two fields directly under the **Calendars** tab. To change the month or year, use the corresponding drop-down menus.

You can also use commands to change the month or year. Press <command-]> to go forward a month and <command-]< to go back a month. Alexandria includes a calendar for the current year, previous year, and three years in the future.

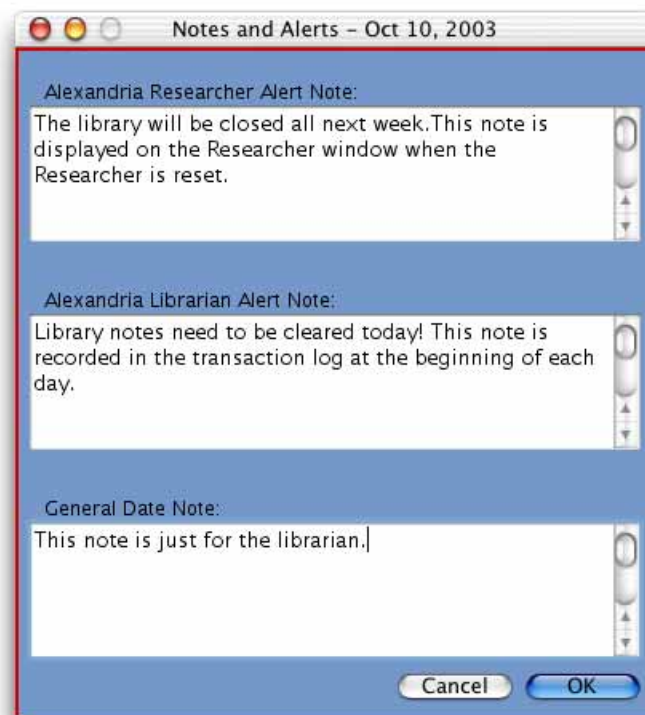
You can mark days on the calendar as **Period Due** dates and as **Closed** dates by clicking on the actual day. The choices cycle from **Open** (nothing displayed), **Closed**, **Period Due**, and then back to **Open**.

**Period Due**—A period due date is the day an item is due, if you check your **Circulation Policy** to **Apply Period Due Dates**. For example, if you set a period due date of September 30, 2007, all books checked out before September 30th (that normally would have had a due date *after* the 30th), will be assigned a due date of September 30th.

**Closed**—These are dates on which the library is closed. **Due** dates are computed so that they never fall on **Closed** dates (only on **Open** or **Period Due** dates). However, please note that there are some exceptions to **Closed** dates when using **Override Dates** (see “*Override Dates*” on page 263 for more information).

You can change the settings for the same day each week for the month by clicking on the day buttons (**Sun** through **Sat**) at the top of the calendar. You can change the settings for all the days of an entire year by holding the <alt>(Windows)|<option> (Macintosh) key down and clicking on the days button at the top of the calendar.

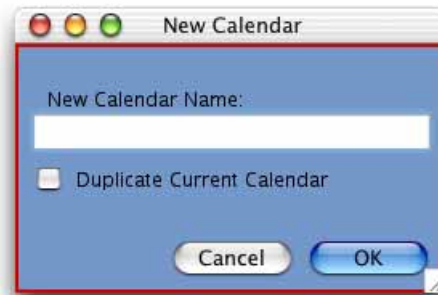
<shift-click> on a date to add a note. Notes can be used to display automatic reminders on both **Librarian** and **Researcher Workstations**, as well as provide private notes for the librarian and patrons. When you’ve created a note, an icon will appear on the calendar day. Alert notes are only active for the **Standard** calendar and are ignored on other calendars. **General Notes** are available for all calendars



**NOTE:**

Once you enter a calendar name in this window, you cannot change it.

Changes to the calendar are saved when you leave the **Calendar** preference window. You can also use the **Save** and **Revert** commands in the **File** menu to save or ignore changes. To create a new calendar, click the **New** button. Enter the name of the calendar that you want to add.



If you want to duplicate an existing calendar as a template for a new one, click the **Duplicate Current Calendar** checkbox.

To delete a calendar, make it the current calendar and click the **Remove** button. Any policies using the deleted calendar will be reassigned to the standard calendar. You *cannot* delete the standard calendar.



# Checkpoint ILS Preferences

## Global Checkpoint ILS Preferences

There are no available **Local** or **Default Local Checkpoint ILS** preferences.

### - N O T E -

**Checkpoint ILS (SIP2)** is an optional feature of Alexandria. You must have purchased a **Checkpoint ILS** license in order to use this feature.

## Checkpoint ILS Tab

Checkpoint's ILS (Intelligent Library System) enhances the SIP2 protocol and should only be enabled if Checkpoint's SIP2 hardware is in use (SIP2 hardware is not interchangeable between manufacturers).

Make sure all **SIP2** settings are correct and that you have an FTP server running on the same machine as your Alexandria Data Station. The ILS server will place an inventory file on your Data Station. If you are not running an FTP server on your Data Station, the inventory file will need to be placed manually.

- ✓ Administration
- Advanced Bookings
- Alexandria Researcher
- Archive
- Authority Control
- Calendars
- Checkpoint ILS
- Circulation
- Display Settings
- Item Management
- Library Information
- Orders
- Patron Management
- Policies
- Routes
- SIF
- Sounds
- Web
- Word Processor

Preferences

Checkpoint ILS Global

Global Preferences apply to all Alexandria users and applications connected to the Data Station. Changing these preferences will affect all users.

Checkpoint ILS

Use Checkpoint ILS with SIP2 ☒

ILS Server Address 0.0.0.0

ILS FTP Path /

FTP User Name User name

FTP User Password \*\*\*\*\*

Inventory File

**ILS Server Address**—This is the web address of the ILS FTP server you'd like to connect with. An FTP address looks a lot like an HTTP (web site) or IP address, except it uses the prefix `ftp://` instead of `http://` and can be any combination of letters and numbers.

**ILS FTP Path**—This is the directory path (on the ILS FTP server) where Alexandria will send its data. Having the wrong FTP path is one of the most common connection errors. If you get an error message when trying to connect, be sure to check your FTP path. Default is `"/`.

**FTP User Name**—The logon username name used to access the ILS FTP server.

**FTP User Password**—The logon password used to access the ILS FTP server.

**Inventory File**—The directory that the ILS server places the inventory file it creates. If the ILS server has not yet created an inventory file, an empty file (of the same name and path) should be created and Alexandria then directed to it using the **Browse** button.

# Circulation Preferences

## Global Circulation Preferences

Circulation preferences contain both **Global** and **Default Local/Local** preferences.

## Circulation Tab

Use this window to set all the preferences that relate to Alexandria's circulation.

The screenshot shows the 'Preferences' window with the 'Circulation' tab selected. The window has a title bar with standard OS buttons. Below the title bar, there are two tabs: 'Circulation' (selected) and 'Misc'. A note at the top states: 'Global Preferences apply to all Alexandria users and applications connected to the Data Station. Changing these preferences will affect all users.' The 'Circulation' tab contains three sections: 'Temporary Item Settings', 'Log Settings', and 'Circulation'. The 'Temporary Item Settings' section has three fields: 'Beginning Temporary Barcode Number' (90000000), 'Ending Temporary Barcode Number' (99999999), and 'Default Temporary Item Policy' (Standard Item). The 'Log Settings' section has one field: 'Transaction Log Save Frequency' (Weekly). The 'Circulation' section has several checkboxes: 'Look for Follett Interleaved 2 of 5', 'Charge Late Fees on Lost Books', 'Charge Late Fee on Found Books', 'Enable Automatic Email Notifications', 'Commands Require Spaces', 'Has Mangled Barcodes' (with a sub-option 'Keep the first five'), 'Alert for Copies from Different Libraries' (checked), and 'Allow '/' to be the first character in patron barcodes'. A note on the right side of the 'Circulation' section explains the 'Has Mangled Barcodes' option: 'If checked, when scanning 13 or 14 digit barcodes Alexandria will strip the first 5 characters, take the next 8 digits and ignore anything else. If 'Keep the first five' is checked, the first five digits will not be stripped.'

## Temporary Item Settings

**Beginning Temporary Barcode Number**—Enter the first number of the barcode range that you want as dedicated to temporary items. Alexandria will treat any barcodes entered within this range as a temporary item (if it hasn't previously been assigned to a patron or item). Default is 90000000.

**Ending Temporary Barcode Number**—Enter the last number of the barcode range you want dedicated to temporary items. Alexandria will treat any barcodes entered within this range as a temporary item (if it hasn't previously been assigned to a patron or item). Default is 99999999.

**Default Temporary Item Policy**—This drop-down menu lets you select the policy that will be applied for temporary circulation items. Default is **Standard Item**.



<input checked="" type="radio"/> Daily
<input type="radio"/> Weekly
<input type="radio"/> Monthly
<input type="radio"/> Never

## Log Settings

**Transaction Log Save Frequency**—Select **Daily**, **Weekly**, **Monthly** or **Never**. Archived logs are placed in the **Log** folder, which is located in Alexandria’s shared application support folder (*see page 4 for more information*). Default is **Weekly**.

The Librarian Workstation also creates a **Log** folder, where archived logs are saved. The transaction log will contain everything that is displayed in the **Circulation** window, and any additional special notes that may be useful. Every individual Alexandria machine will keep a transaction log that contains a history of everything that has occurred on that workstation. It can be a valuable document if you want to examine any workstation’s history.

The following choices are available.

**Daily**—The transaction log is archived at the beginning of each day and is placed in the **Log** folder with a name such as **Circ Log for day 19990730** (yyyymmdd).

**Weekly**—The transaction log is archived every week (a week starts on Monday) and is placed in the **Log** folder with a name such as **Circ Log for week 19990729** (yyyymmdd).

**Monthly**—The transaction log is archived at the beginning of every month and is placed in the **Log** folder with a name such as **Circ Log for month 199907** (yyyymm).

**Never**—The transaction log is saved, but never archived. Under this option, the transaction log can grow to be very large.

✓ Administration
Advanced Bookings
Alexandria Researcher
Archive
Calendars
Checkpoint LSI
Circulation
Display Settings
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Library Information
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## Circulation

**Look for Follett Interleaved 2 of 5**—If you have any items with Follett interleaved 2-of-5 labels, check this box. This setting looks for all barcodes that are exactly 10 digits long and removes the last three digits that Follett uses as check digits. Default is OFF.

**Charge Late Fees on Lost Books**—If this option is ON, then late fees continue to accumulate on lost books up to the max fee limit. To stop charging fees on a particular item, **Remove** the copy or assign it as **Discarded**. Default is OFF.

**Charge Late Fees on Found Books**—If this option is checked, when a lost item has been located, the patron who last had the book is charged an overdue fine for the period between when the item was lost and when it was found. Default is OFF.

**Enable Automatic Email Notifications**—Check this box if you want Alexandria to automatically send email confirmations and notices to patrons. If selected, Alexandria will send email to patrons that have valid email addresses when the following events occur: hold placed, hold expires, in-stock hold available, in-stock hold expires, item becomes overdue, and recall issued.

To guarantee that your email notifications are being sent, you must have a valid **Library Email Address** (page 131), a valid patron email address (page 181), text in your **Overdue Notice** letter field (page 114), and this **Enable Email Notifications** box checked. Default is OFF.

**Commands Require Spaces**—Checking this box will require that all Alexandria **Circulation** window commands (or remote transaction import scripts) have spaces between the actual command and any additional command information. For example, if this box is checked, Alexandria won't be able to recognize the command F4.50 (a charge of four dollars and fifty cents). However, if you enter F 4.50, with a space between the F and the 4, then Alexandria will be able to process the command. This preference exists for school who use barcodes that start with letters of the alphabet; that in case they are imported, they are not misinterpreted as Alexandria commands.

**Has Mangled Barcodes**—Process 13 or 14 digit barcodes, strip the first 5 characters, take the next 8 digits and ignore anything else.

**Keep the first five**—Process 13 or 14 digit barcodes, takes the first 13 digits of a 13 or 14 digit barcode. Default is OFF.

**Repair Trailing Alpha Check Digit**—If this box is checked, items that *would* match a scanned barcode (if they had the exact same trailing alpha check digit) are repaired so that their barcodes match exactly. If you need to enable/disable this option, please contact COMPAnion's Technical Support team.

**Repair Trailing Numeric Check Digit**—This option is the same as above, only for numeric check digits. If you need to enable/disable this option, please contact COMPAnion's Technical Support team.

**Ignore Leading Zeros on Barcodes**—If you need to enable/disable this option, please contact COMPAnion's Technical Support team.

**Alert for Copies from Different Libraries**—If checked, a warning message will appear when copies from different libraries are checked in or inventoried.

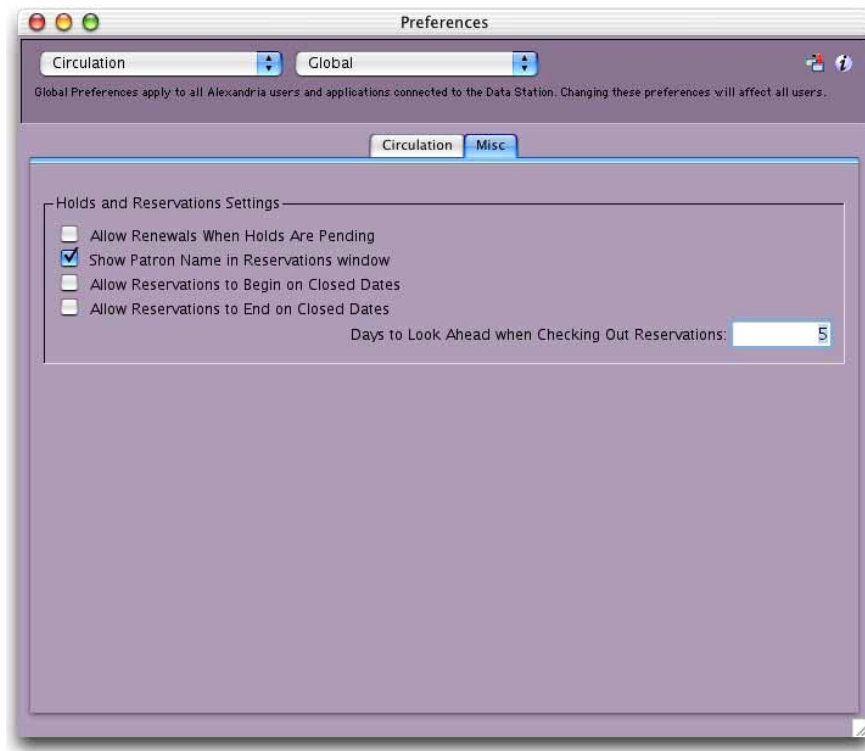
**Allow "/" to be the first character in patron barcodes**—If checked, patron barcodes that begin with the "/" character may be used. The **Change Barcode** command will be only be available if **Commands Require Spaces** is checked. However, barcodes may be charged in the **Items** and **Patrons** window.

## Global Circulation Preferences

Circulation preferences contain both **Global** and **Default Local/Local** preferences.

### Miscellaneous Tab

Additional **Global Circulation** preferences.



### Holds and Reservations Settings

**Allow Renewals When Holds Are Pending**—When checked, this option allows users to renew books that have hold requests pending. Default is unchecked.

**Show Patron Name in Reservations Window**—When unchecked, patron barcodes are displayed in the reservations window. When checked, the patron's last name is shown in the reservations window. Default is checked.

**Allow Reservations to Begin on Closed Dates**—When checked, this option allows users to place reservations that begin on closed library dates. Default is unchecked.

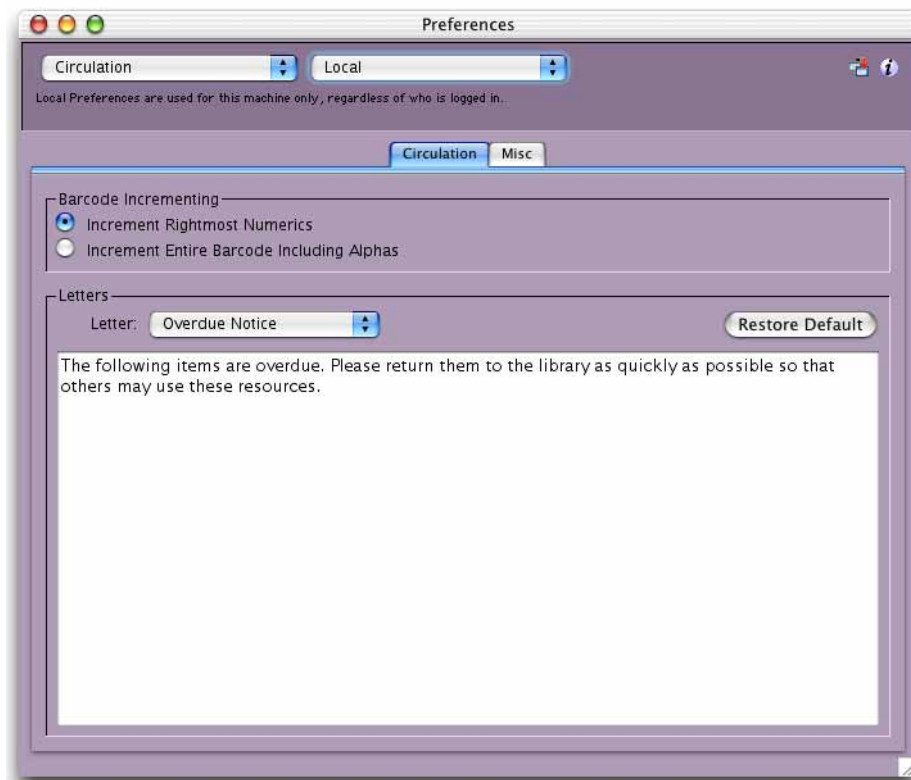
**Allow Reservations to End on Closed Dates**—When checked, this option allows users to place reservations that end on closed library dates. Default is unchecked.

**Days to Look Ahead When Checking Out Reservations**—This sets the number of calendar days that Alexandria looks ahead for reservations when items are checked in. During check in, if a reservation is detected within this specified time period, Alexandria displays a notice for the user. The "GG" and "GPP" circulation commands also take this date into account before checking reservation items out to patrons. Default is set to 5 days.

## Local Circulation Preferences

Circulation preferences contain both **Global** and **Default Local / Local** preferences.

### Circulation Tab



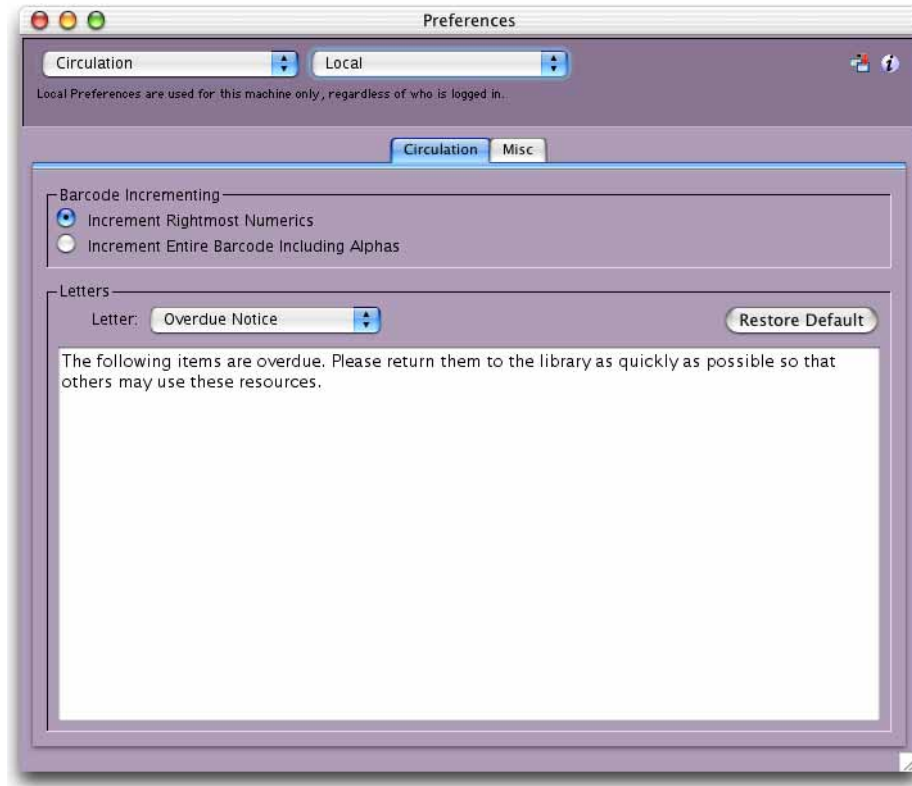
### Barcode Incrementing

**Increment Rightmost Numerics**—When this option is selected, incremented barcodes only modify the rightmost numeric digits. This is the default setting.

**Increment Entire Barcode Including Alphas**—When this option is selected, incremented barcodes modify both numeric and alpha characters.

## Letters

Use this section to customize the body text of the letters (patron notices) sent from the library. To guarantee that your email notifications are being sent correctly, please check the list of requirements that are located under the **Enable Email Notifications** section on page 111.



Use the **Restore Default** button to restore your text with the default text. Default text is as follows:

**Overdue Notice**—"The following items are overdue. Please return them to the library as quickly as possible so that others may use these resources."

**In-Stock Hold**—"An In-Stock item is being held for you. Please pick it up by the specified date or it will be returned to general circulation."

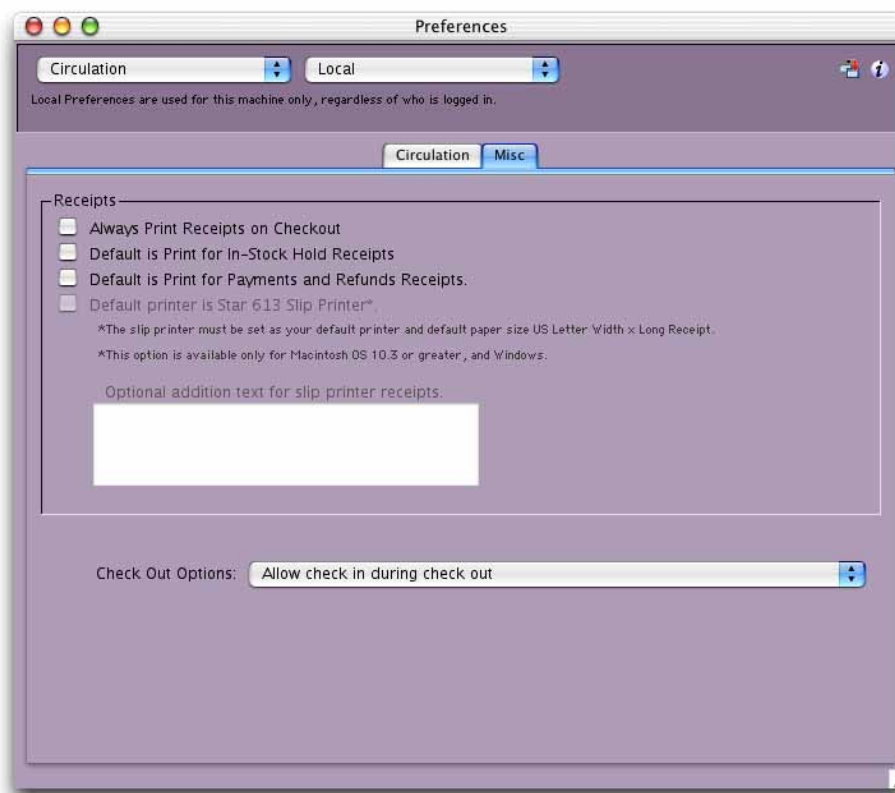
**Recall**—"The following item is required at the library. Please return it as quickly as possible."

**Reservation Notice**—"Please note that you have a reservation on the following items. Reserved items should be picked up in the morning of the reservation start date and returned by the evening of the due date."

## Local Circulation Preferences

Circulation preferences contain both **Global** and **Default Local / Local** preferences.

### Miscellaneous Tab



### Receipts

**Always Print Receipts on Checkout**—When checked, Alexandria will automatically print a receipt for every item that is checked out. This receipt contains information similar to that which is displayed when you click on the Current Item's **Details** button. When **OFF**, receipts can be printed manually using the "D" or "QP" command in the **Circulation** window at the end of a transaction.

**Default is Print for In-Stock Hold Receipts**—When checked, Alexandria will automatically print a receipt when an item becomes an in-stock hold.

**Default is Print for Payments and Refunds Receipts**—When checked, Alexandria will automatically print receipts for payments and refunds.

**Default printer is Star 613 Slip Printer**—Having this option checked indicates that this Data Station or Librarian Workstation is connected to a slip printer. The slip printer *must* be set as your operating system's default printer for every computer that you would like to print receipts from; your default paper size must be **US Letter Width x Long Receipt**.

The slip printer will produce receipts for Alexandria events in the same fashion that a normal printer would, depending on the print triggers you have selected above. The slip printer option is only available for Macintosh OS 10.3 (or higher) and all Windows operating systems.

**Optional additional text for slip printer receipts**—This is a user-defined text header that appears before the general header (or after the patron name on in-stock hold receipts). This header will be centered horizontally and can be as many lines as are required by the user. This field is most often used to house the name and address of your school or library.

### Check Out Options

This drop-down menu allows librarians to limit the capabilities of Alexandria's **Check In/Out Circulation** mode.

**Allow check in during check out**—If Alexandria is in **Check Out** mode, this option allows items to be checked into the **Circulation** window as well.

**Allow check in with confirmation during check out**—If you try to check in an item (or items) while the **Circulation** window is in **Check Out** mode, Alexandria will require verification before checking-in any items.

**Don't allow check in during check out**—This selection will disallow items to be checked in using Alexandria's **Circulation Check Out** window. For example, your library may require separate Data Stations, some that only allow items to be checked in and others that only allow items to be checked out.



# Display Settings Preferences

## Local Display Setting Preferences

There are no available **Global Display Settings** preferences.

## Display Settings Tab

To customize Alexandria's color settings, double-click on the description of the Alexandria window that you want to change. A standard operating system color change window will appear.



### NOTE:

After you leave the **Display Settings** preference window, the color scheme you select will not be applied until Alexandria has been restarted.



Customize your Alexandria colors as you see fit, then click **OK**.

Use the **Pre-Defined Color Scheme** drop-down menu to choose a default from a selection of pre-created color schemes. Once a color scheme has been selected, they can be further customized. The default color scheme is **General**.

Color schemes are local for each Workstation (Researcher or Workstation). When a Workstation is first launched, it will borrow the **Default Local** preferences from the Data Station. Any future changes to that Workstation will be applied solely for that "local" workstation.

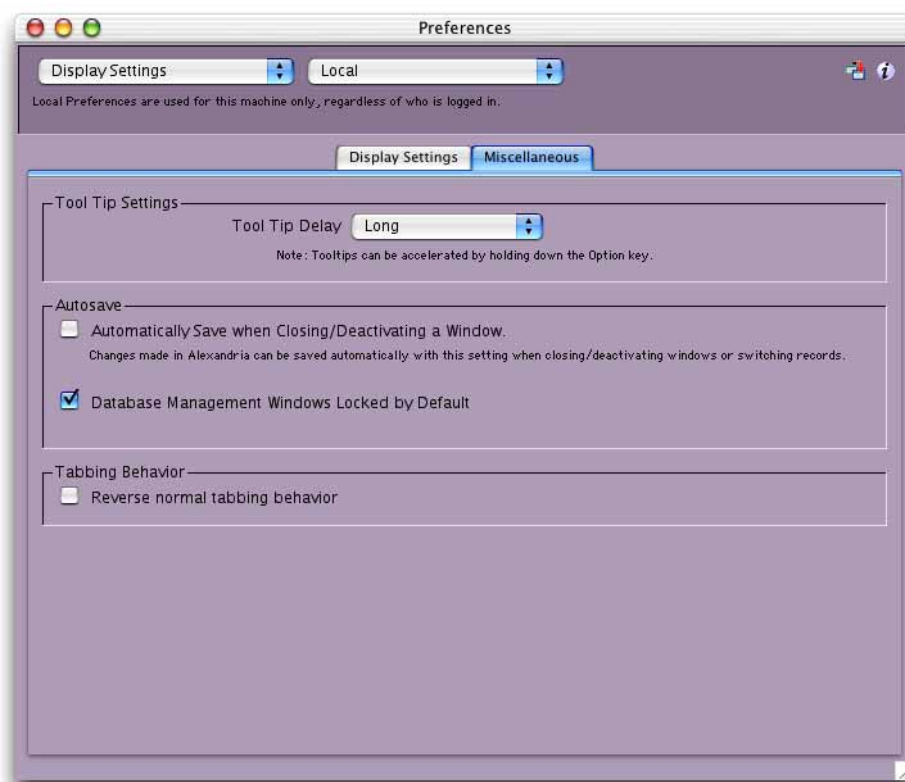
- ✓ Administration
- Advanced Bookings
- Alexandria Researcher
- Archive
- Calendars
- Checkpoint LSI
- Circulation
- Display Settings
- Item Management
- Library Information
- Orders
- Patron Management
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## Local Display Settings Preferences

There are no available **Global Display Settings** preferences.

### Miscellaneous Tab

Use these controls to further customize the look of your Alexandria Data Station or Workstaion.



### Tool Tip Settings

**Tool Tip Delay**—Selects delay time for tool tips (those short pieces of descriptive text that appear when you move your mouse cursor over buttons and such). Tool tips can also be viewed instantaneously by holding down the <ctrl> (Windows) or <option> (Macintosh) key and moving over buttons and fields. Default is **Medium**.

### Autosave

**Automatically Save when closing/deactivating a window**—When this box is checked, Alexandria automatically performs the **Save** operation, rather than asking for user confirmation. Default is OFF.

**Database management windows locked by default**—When this box is checked, the user must unlock the current record in order to begin making changes. A locked record can *not* be modified. Default is ON.

**Tabbing Behavior**

**Reverse Normal Tabbing Behavior**—On the Macintosh, if this box is *not* checked, it will allow users to <tab> through all of a given window's tabs quickly without having to also tab through all the drop-down menus and editable fields contained within that window tab.

If this box is checked (on the Macintosh), then <tabs> will scroll through every drop-down window and editable field contained within every window's tab.

On Windows, the above checkbox order is completely reversed.

Holding down <ctrl> while tabbing will temporarily reverse the tab order.



# Item Management Preferences

## Global Item Management Preferences

**Item Management** preferences contain both **Global** and **Default Local/Local** preferences.

### Items Tab

Use this preference to configure general information about your item barcode(s), default item policies, and other general catalogue settings.

### Barcode Settings

**Ignore Barcode Leader of**—If you are using barcode numbers not designed for Alexandria, you can specify that Alexandria automatically ignore leading characters. For example, your item barcodes may have the text “ITM” in front of each barcode, enter “ITM” in the **Ignore Barcode Leader of** field. Alexandria will ignore the “ITM” at the beginning of the barcode label. If you have no need of this feature, leave the field blank.

**Unused Barcodes**—Creates a list of all the unused barcodes in a specified range. Barcode range cannot exceed “10,000.”

### Other Settings

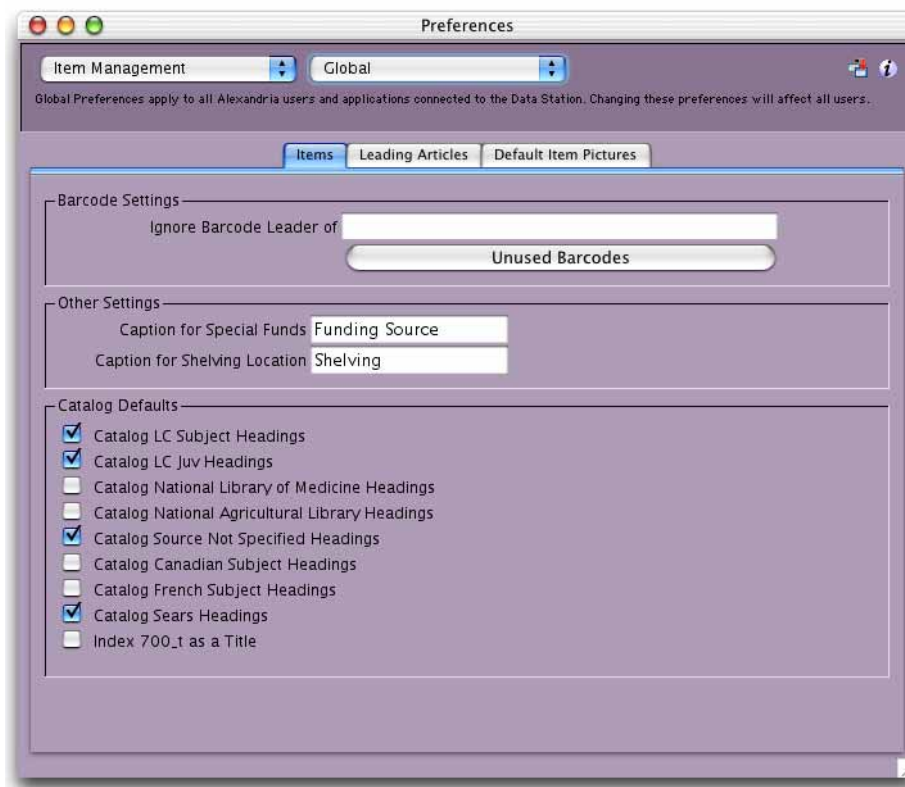
**Caption for Special Funds**—This field allows you to customize the term used for your special **Funds**. Because you can customize this term, this user’s manual will use the generic term “Funds.” This field allows you to keep better track of where special funding for an item came from. For example, if you have to report the status of items purchased using government grants or special funds, enter the grant number or special fund name in this field. You can then generate reports using this field. Default setting is **Funding Source**.

**Caption for Shelving Location**—Input the terminology you want for “shelving,” an alternative location field that goes into the **852\_c** tag.

- ✓ Administration
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## Catalog Defaults

This window sets the item cataloguing defaults.



## Catalog Defaults

These options tell Alexandria which subject headings you want catalogued. Since cataloguing only occurs during an import or modification of records, your changes will only be reflected in new records unless you rebuild your database. If you do not understand these settings, please talk to a qualified MLS librarian or MARC expert.

**Catalog LC Subject Headings**—Default is **ON**.

**Catalog LC Juv Headings**—Default is **ON**.

**Catalog National Library of Medicine Headings**—Default is **OFF**.

**Catalog National Agricultural Library Headings**—Default is **OFF**.

**Catalog Source Not Specified Headings**—Default is **ON**.

**Catalog Canadian Subject Headings**—Default is **OFF**.

**Catalog French Subject Headings**—Default is **OFF**.

**Catalog Sears Headings**—Default is **ON**.

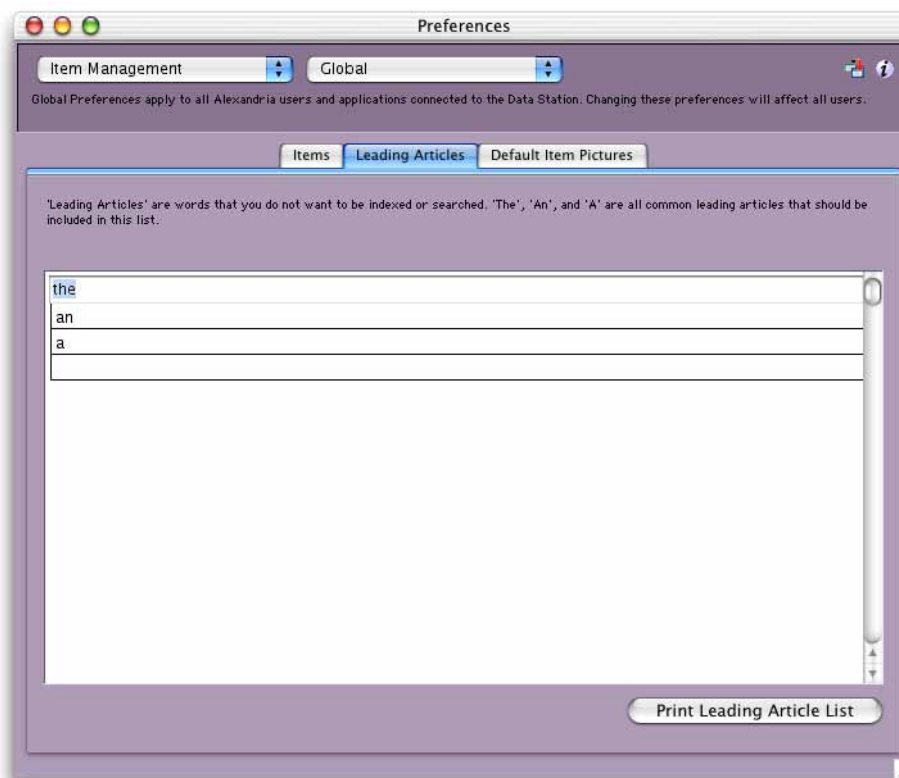
**Index 700\_t as a Title**—Default is **OFF**.

## Global Item Management Preferences

**Item Management** preferences contain both **Global** and **Default Local/Local** preferences.

### Leading Articles Tab

This preference window allows users to specify which leading articles (e.g. the, an, a) should be ignored during cataloguing and searching. Since leading articles vary from language to language, this preference gives the librarian total control over how they are defined.



Where is this preference used?

- Titles beginning with these leading articles will be sorted by the next available word. The second indicator of the **245** tag is automatically set to the correct MARC standard value for the skipped leading article.
- Series beginning with these leading articles are sorted by the next available word. The second indicator of the **440** tag is automatically set to the correct MARC standard value for the skipped leading article.
- When Alexandria searches for titles, queries that begin with a leading article will automatically have that term skipped. Thus, the query for "The Cat in the Hat" will actually search for "Cat in the Hat."
- When searching for a series, queries beginning with a leading article will automatically have that term skipped. Thus, the query "The Wizard of Oz" will actually search for "Wizard of Oz."

## Global Item Management Preferences

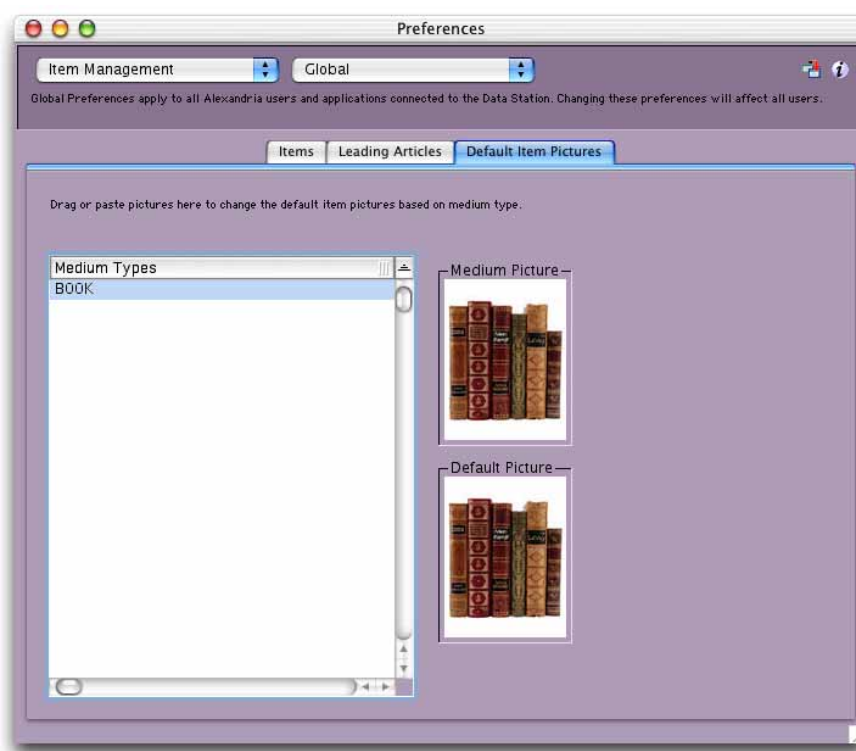
**Item Management** preferences contain both **Global** and **Default Local/Local** preferences.

### Default Item Pictures Tab

The **Default Item Pictures** preference window allows users to apply pictures to individual items or default mediums by dragging and dropping their own GIFs, BMPs, PICS, JPGs (or most standard image files) onto the **Medium Picture** field. Once this is done, a new medium picture will be applied. Users can reset to the default medium picture by clicking the **Reset All Item Pictures** button.

If you have a pictureless medium (e.g., in the case of a newly created medium), the **Default Picture** field is applied to any and all mediums lacking an individual **Medium Picture**.

The default medium picture will appear on the **Circulation** window every time there is an item current—unless an item has an individual picture applied to it from within the **Item Management** window (see “Item Information Fields” on page 196).



Here are the steps to apply a new default medium picture:

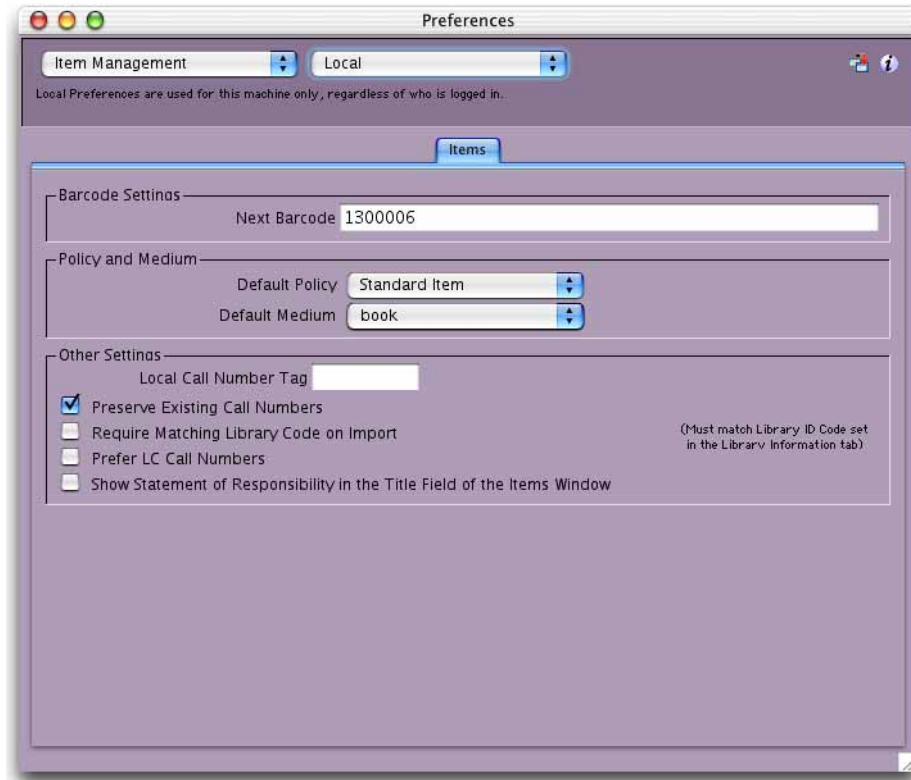
- Step 1. Select which medium's picture you would like to change from the **Medium Types** field on the left-hand side of the screen. Alternately, if you'd like to apply a **Default Picture** to all the mediums that currently lack one, follow the steps below.
- Step 2. Drag and drop your medium image on to the **Medium** or **Default Picture** fields on the right-hand side of the window. Images can also be pasted into the **Medium** or **Default Picture** field from your operating system standard clipboard.
- Step 3. Click **Save** to apply your changes or **Revert** to discard them.



## Local Item Management Preferences

**Item Management** preferences contain both **Global** and **Default Local/Local** preferences.

### Items Tab



### Barcode Settings

**Next Barcode**—This field contains the next available item barcode number. When you enter a new copy record, Alexandria will automatically assign the next available barcode (unless you assign a number manually). You should set this field when you first configure Alexandria, so that any copies you add are assigned an item barcode number that agrees with your numbering strategy. Default is "1300000".

### Policy and Medium

**Default Policy**—Using this drop-down menu, you can set the default item policy for newly added records. The default is **Standard**. If you assign an item policy that is later removed from the system, the **Default Policy** will return to **Standard**.

**Default Medium**—Using this drop-down menu, you can set the default item medium for newly added records. Default is **Book**.

## Other Settings

**Local Call Number Tag**—During import, if your call numbers are not kept in the customary location within the MARC record, use this preference to configure where Alexandria should check first for the call number.

If you enter a valid “tag\_subfield,” Alexandria will scan that point in the MARC record to find the call number. If your call numbers are typically at **900a**, enter **900a** in this field. The default setting is blank.

**Preserve Existing Call Numbers**—When this checkbox is set, existing call numbers will never be modified during an import or during automatic SmartMARC record updating. Default is ON.

**Require Matching Library Code on Import**—When this box is checked, only copy information with your library code (or no library code) in the **852\_a** tag is imported. All other library codes are ignored. Default is OFF.

Some districts keep a central union catalog with all district holdings. When these records are transferred to an individual library, each title may contain holding information for libraries in the district. This option allows each library to import holding records, which belong only to that library. Other holding records are automatically removed from the MARC record before it's saved.

**Prefer LC Call Numbers**—When this checkbox is set, Alexandria looks first for a Library of Congress Call Number when looking for call numbers in an imported MARC record. Default is OFF.

**Show Statement of Responsibility in the Title Field of the Items Window**—When this box is checked, Alexandria shows the Statement of Responsibility **245\_c** in the title field of the **Item Management** window. Default is OFF.

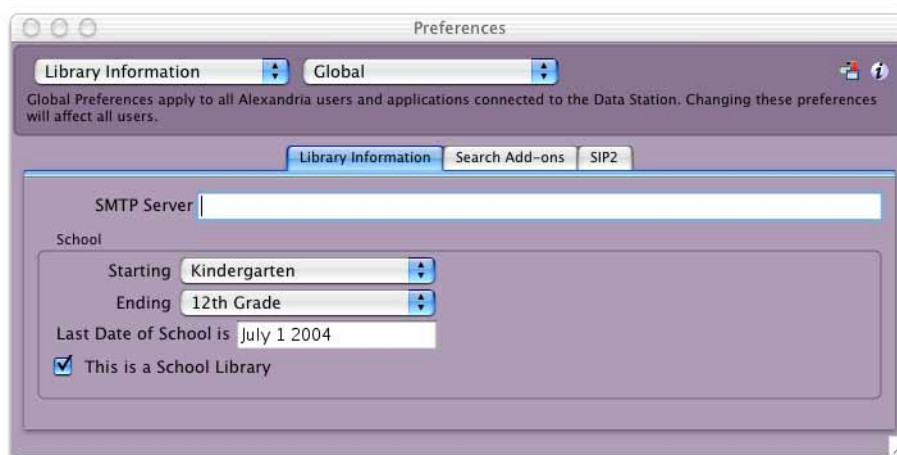
# Library Information Preferences

## Global Library Information Preferences

**Library Information** preferences contain both **Global** and **Default Local/Local** preferences.

## Library Information Tab

The **Library Information** preference window is the default window that appears every time you select Alexandria's **Preferences** from the **Edit** menu or the shortcut keys <Ctrl-I> (Windows) or <Cmd-I> (Macintosh). Use this preference to personalize Alexandria with information about your library.



**SMTP Server**—This is the TCP/IP or DNS address of your library's mail server. Typically, this will be "mail." followed by your domain name. You must enter a valid SMTP Server address to use email services. Default is blank.

## School

Use this section to specify the type of school that Alexandria is being used for.

**Starting**—Use the drop-down menu to select the starting grade level of your school. Default is **Kindergarten**.

**Ending**—Use the drop-down menu to select the ending grade of your school. Default is **12th Grade**.

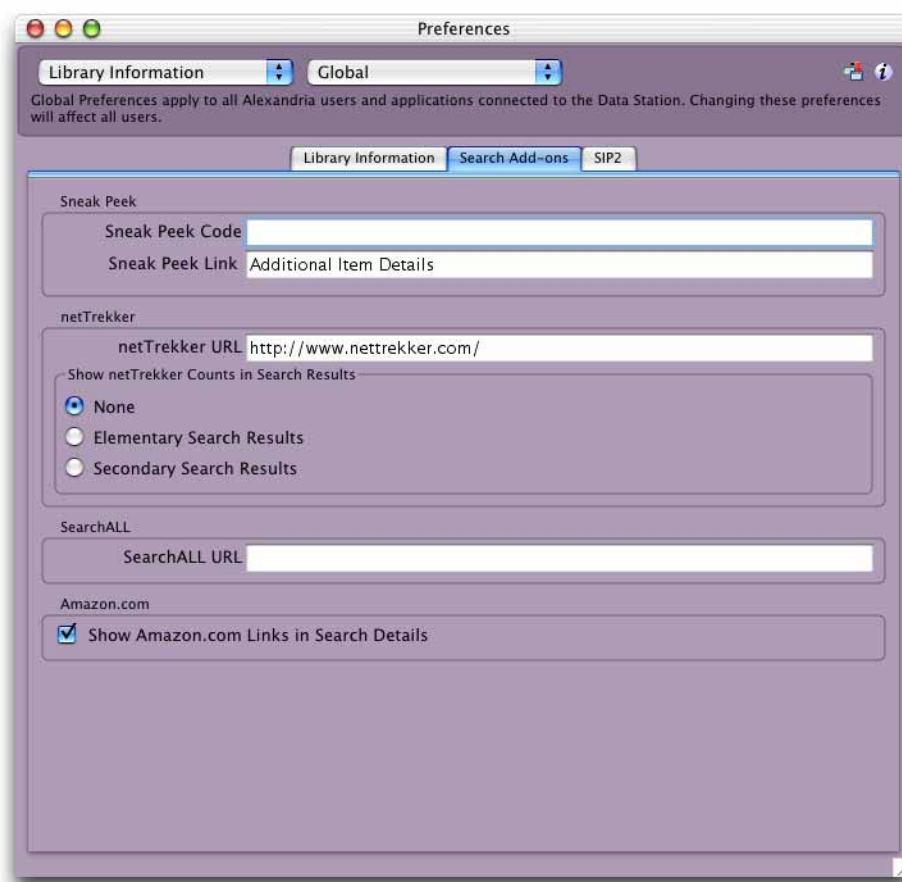
**Last Date of School is**—Identifies the last date of the current school year. On this date, all patrons graduate to the next grade level. Default is July 1st of the current year.

**This is a School Library**—When this box is checked, Alexandria uses defaults and settings which assume that Alexandria is being used for a school library. Turning this option off either hides school elements or changes them into non-school related terms. Default is set based upon your activation codes. If your activation code contains "H1," it will default to ON.

## Search Add-ons Tab

### - N O T E -

**Sneak Peek**, **netTrekker**, and **SearchALL** are optional features of Alexandria. You must purchase subscription licenses to use these features. When you have licensed use of one or both of these search interfaces, these preference options will become available.



## Sneak Peek (Syndetics)

**Sneak Peek Code**—In this field, enter the code that activates **Sneak Peek**. This code should be made available to you if you have a **Sneak Peek** subscription.

**Sneak Peek Link**—This is the text that is displayed in the top-right corner of the **Item Details** search window when the **Sneak Peek** hyperlink is available. For more information on **Sneak Peek**, please review the “Viewing Item Details from a Standard Search Results List” on page 300. Default text is **Additional Item Details**.

## netTrekker

For more information on **netTrekker**, please review the corresponding section on page 309.

**netTrekker URL**—If necessary, and *only* if necessary, the URL used to access the netTrekker website can be modified here. Please contact COMPanion's Technical Support team if you are required to change your netTrekker URL.



## Show netTrekker Counts in Search Results

This radio button informs patrons on how many netTrekker resources are available about their topic and also allows users to choose whether they would rather return **Elementary Search Results** (K-5) or **Secondary Search Results** (6-12)<sup>1</sup>. Choosing **None** will temporarily disable netTrekker functionality in Alexandria.

The number of results that are returned for each search will be displayed inside the netTrekker icon, which can be located near the top of the **Researcher** window. The example in the left margin shows that 106 results were returned for a secondary education search.



## SearchALL

**SearchALL URL**—If necessary, the URL that is used to access the **SearchALL** website can be provided here.

## Amazon.com



**Show Amazon.com Links in Search Details**—Choose whether or not to display links to **Amazon.com** at the bottom of the **Researcher Details** window. If a search is successfully performed, clicking on the graphic link (shown to the left) will open a Amazon.com web browser with the closest possible match.

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1. This option will effect searches that are performed from the **Researcher** window and those that are done from Alexandria **Web**.

- ✓ Administration
- Advanced Bookings
- Alexandria Researcher
- Archive
- Calendars
- Checkpoint LSI
- Circulation
- Display Settings
- Item Management
- Library Information
- Orders
- Patron Management
- Policies
- Routes
- SIF
- Sounds
- Web
- Word Processor

## SIP2 Tab

The options in this window deal with miscellaneous SIP2 functions.

**Hold Pick Up Location**—This is posted to SIP2 machines when a hold is available and is the location where patrons can retrieve available items.

**Terminal Screen Message**—This is the welcome message that appears on self-service SIP2 terminals when a patron logs in. Default is the library name.

**Terminal Receipt Header**—This appears at the top of printed SIP2 receipts when a patron has completed their hold or check out. Default is the library name.

**Default Terminal Screen Width**—The number of characters able to be displayed on a single line on the SIP2 hardware. Users should refer to their SIP2 hardware's documentation for this number. This field is enabled and set to 255 characters when users have indicated that they are using **Checkpoint** hardware.

**Default Terminal Receipt Width**—The number of characters able to be printed on receipts given by the SIP2 hardware. Users should refer to their SIP2 hardware's documentation for this number. Default is 40.

**Terminal Password**—This field is required for the SIP2 machine to validate itself to Alexandria. By default, the terminal password is your Alexandria serial number or 7777777.

**Log SIP2 in Transaction Log**—When checked, all transactions on SIP2 machines are logged to the transaction log of the Alexandria Data Station. All SIP2 transactions are logged to the log file whether this box is checked or not.

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- Web
- Word Processor

## Local Library Information Preferences

**Library Information** preferences contain both **Global** and **Default Local/Local** preferences.

## Library Information Tab

**Local Preferences** are used for this machine only, regardless of who is logged in.

### Library Address

Enter the name of your library. The default is your library license name.

You must enter your address, city, state, postal code, country, telephone and fax; this data is used for return addresses on patron notices and for information shown on Alexandria Web.

### Library Hours

The text you enter in this field is displayed in the **Library Information** page of your Alexandria Web. Describe your library hours (e.g. 9:00 a.m. - 6:00 p.m. Monday through Friday) with any combination of numbers and hours. If you decide to leave this field blank, the text **Library Hours Not Specified** will appear on your Alexandria **Library Information** Web page.

### Information

**Librarian**—This is the name that appears at the bottom of form letters. Enter the librarian's name here. Default is **Librarian**.

**Librarian Title**—The librarian's title. For example, Librarian, Director of Media or Library Specialist; this title can also be included on form letters. Default is blank.

**Library Email Address**—This is the library's email address, which is used as the return mail address for overdue notices and other email messages sent by Alexandria. To guarantee that your email notifications are being sent, please check the list of requirements located under **Enable Email Notifications** on page 111. You must enter a valid email address to use most email services. Default is blank.

**Library ID Code**—This is the library location identification code. This is a short code that is used for the MARC location code at **852\_a** in the **Copy Collection** field. Default is the first four characters of your library name. If you change this value, all matching copy records are automatically updated to the new value.

### Local Settings

**Money Format**—Select the money format you want Alexandria to use. Default is **Use System Setting**.

**Language**—Select a default language from the list of available languages. Default is **English** unless otherwise set by activation codes.

**Use a fingerprint scanner on this computer**—Check to activate fingerprint services on this computer.



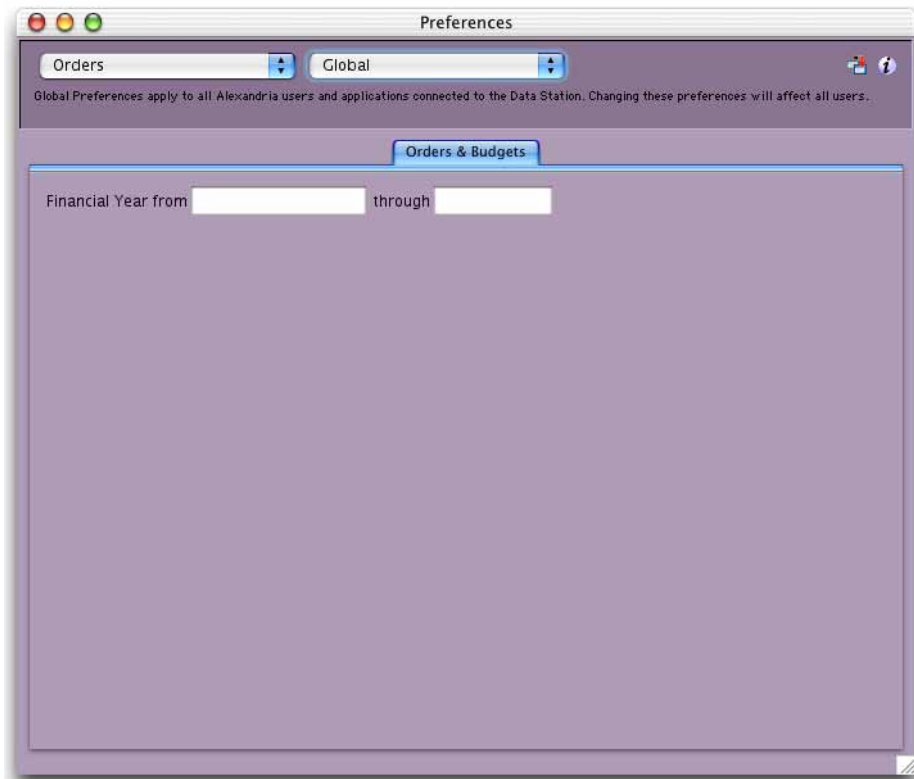


# Orders Preferences

## Global Orders Preferences

**Orders** preferences contain both **Global** and **Default Local/Local** preferences.

## Orders & Budgets Tab



**Financial Year from**—Use this preference to configure the financial range for which your budget falls. Budgets are computed only for the current financial period provided in this window. Default is blank. A blank financial period will include all dates for the year.

The Financial Year is also used for computing **Lost** and **Discarded** items in the standard Super Summary. Only items that are **Lost** or **Discarded** within this financial year are counted on the Super Summary.

- ✓ Administration
- Advanced Bookings
- Alexandria Researcher
- Archive
- Calendars
- Checkpoint LSI
- Circulation
- Display Settings
- Item Management
- Library Information
- Orders
- Patron Management
- Policies
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- SIF
- Sounds
- Web
- Word Processor

## Local Orders Preferences

Orders preferences contain both **Global** and **Default Local/Local** preferences.

### Orders & Budgets Tab

### Addresses

**Bill To**—Enter the **billing** address for your orders. If you fail to specify an address, when you print an order, the library address will be used.

**Ship To**—Enter the **shipping** address for your orders. If you fail to enter an address, when you print an order, the library address will be used.

### Miscellaneous

**Sales Tax%**—Enter the default sales tax rate for your orders. Default is 0%.

**Add Items to Collection on Receipt**—Mark this checkbox to set the default value for new orders. Default is OFF. If you typically receive MARC records from your vendor for Alexandria import when your items are received you will want to leave this setting OFF.

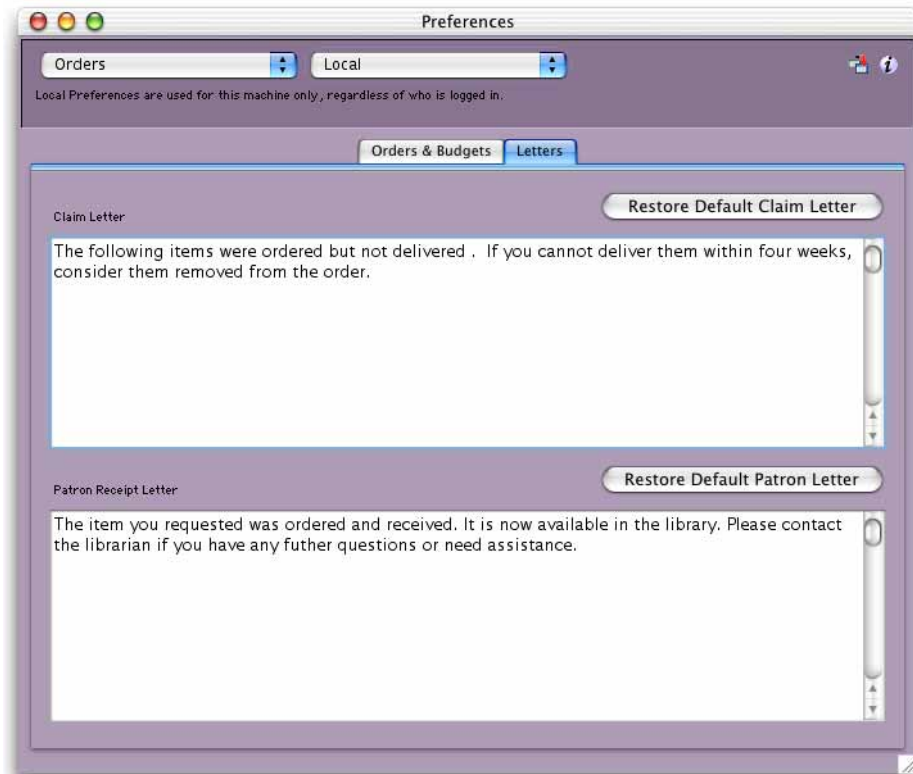
**Sort Order Line Items by Title**—Use this preference to set the default sorting order of line items. Check this box to sort by title. Uncheck to sort in the order that the items were added. Default is OFF.

## Local Orders Preferences

**Orders** preferences contain both **Global** and **Default Local/Local** preferences.

### Letters Tab

Enter text for patron receipts and order claim letters in this window. Claim letters can be printed by the librarian for incomplete orders. A claim letter is addressed to your vendor and includes the claim letter text below and a list of items that have not been received for the order in question. Claim letters are only printed for **Issued** orders; **Open** or **Closed** orders can not generate claim letters.



The default **Claim Letter** is:

"The following were ordered but not delivered. If you cannot deliver them within four weeks, consider them removed from the order."

The default **Patron Receipt Letter** is:

"The item you requested was ordered and received. It is now available in the library. Please contact the librarian if you have any further questions or need assistance."



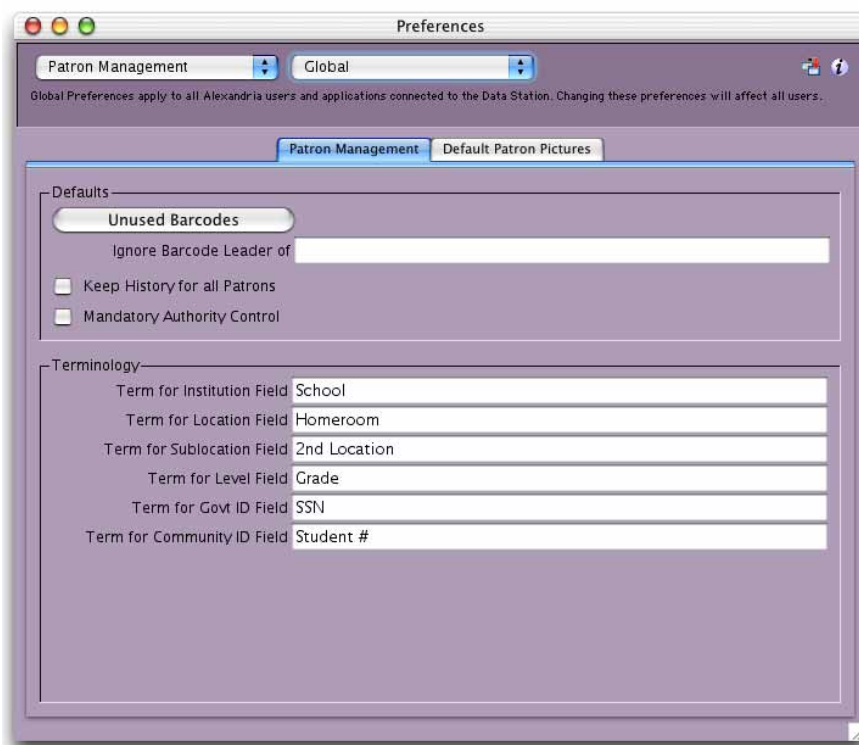
# Patron Management Preference

## Global Patron Management Preferences

**Patron Management** preferences contain both **Global** and **Default Local/Local** preferences.

## Patron Management Tab

Use the patron management preferences to configure next patron barcodes, default patron policies, terminology, and other general information about your patrons.



## Defaults

**Unused Barcodes**—Creates a list of all unused patron barcodes within a specified range. The selected barcode range cannot exceed 10,000.

**Ignore Barcode Leader of**—If you are using barcode numbers not designed for Alexandria, you can have Alexandria automatically ignore leading characters. For example, if your patron barcodes have the text “PAT” in front of each barcode, enter “PAT” in this field. Alexandria will ignore the “PAT” at the beginning of each barcode label. If you don’t require use of this feature, leave the field blank.

**Keep History for all Patrons**—Check this box if you want Alexandria to keep a transaction history for all the patrons who use your library. Default is OFF.

**Mandatory Authority Control**—This makes Authority Control active and mandatory when you add new patrons or change fields that are authority controlled. **Location**, **2nd location**, and **Grade** are all authority controlled.

## Terminology

This preference lets you customize terms for use in Alexandria.

**Term for Institution Field**—This preference lets you configure the term used for the **Institution** field. For example “School” instead of “Institution.”

**Term for Location Field**—This preference lets you configure the term used for the **Location** field. For example, you may want to use the term “Homeroom” rather than “Location.” The term you choose appears on the **Personal Info** tab in **Patron Management** and wherever else Alexandria shows this information.

Although you can change this term, this manual will refer to it as “Location.”

For school libraries, this defaults to “Homeroom”; for other libraries, this defaults to “Location.”

If numeric ranges are going to be used in this field, they need to be padded with zeros in order to be sorted and selected correctly. For example, instead of a “1”, “2”, “402”, you’d insert “001”, “027”, “402”. Basically, **all entries with a numeric range need to have the same number of characters.**

**Term for Sublocation Field**—This preference lets you configure the term used for the **2nd Location** field. The **2nd Location** field appears under the **Personal Info** tab of the **Patron Management** window.

You can use this field for whatever extra information you may need to enter. For example, you may want to use the term “Last Period” to identify an alternate location below the primary **Location** field. The term you choose appears wherever Alexandria displays this information.

Although you can change this term, this manual will refer to it as “2nd Location.” Default value is “2nd Location.”

**Term for Level Field**—This preference lets you configure the term used for the **Level** field. For example, you may want to use the term “Grade” rather than “Level.” The term you choose appears under the **Personal Info** tab of the **Patron Management** window and wherever else Alexandria shows this information.

Although you can change this term, this manual will refer to it as “Level.”

For school libraries, this defaults to “Grade.” For other libraries, this defaults to “Level.”

**Term for Government ID**—This field is used for national ID numbers. In the United States, this is typically the Social Security Number. Default value is “SSN.”

**Term for Community ID**—This field is used for community or local ID purposes. For school libraries, this defaults to “Student #”; for other libraries, this defaults to “ID #.”

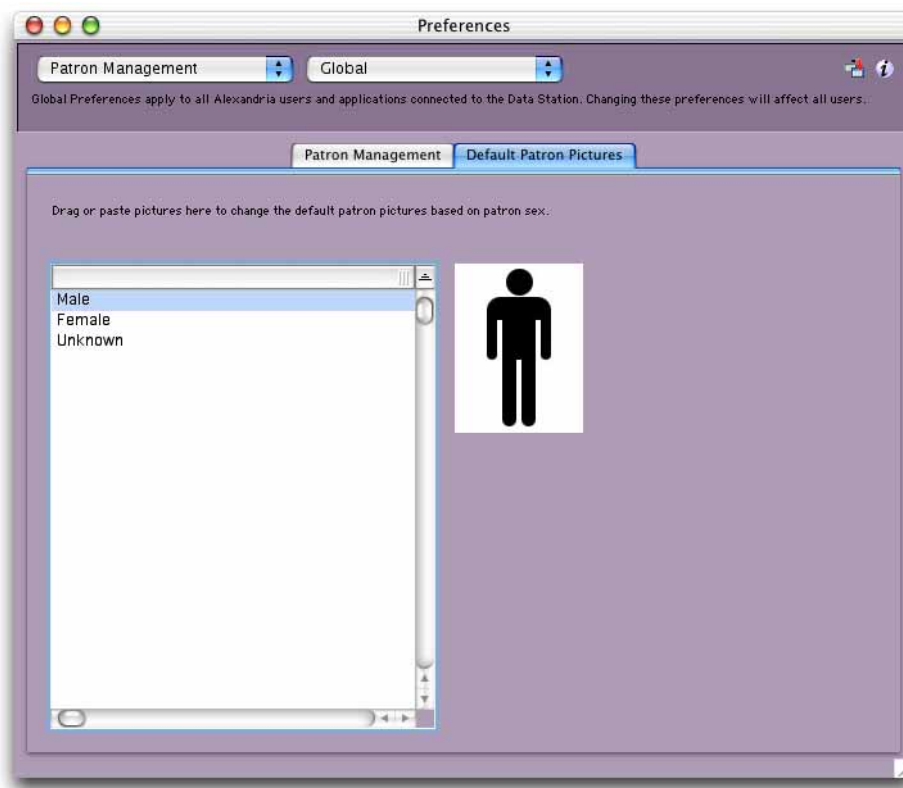
## Global Patron Management Preferences

**Patron Management** preferences contain both **Global** and **Default Local/Local** preferences.

### Default Patron Pictures Tab

If your school or library doesn't have individual pictures attached to patrons within the **Patron Management** window, you can apply generic **Male**, **Female**, or **Unknown** identifiers to patrons based on the **Gender** field (see "*Patron Information Fields*" on page 181).

The **Default Patron Pictures** preference window allows users drag and drop their own GIFs, BMPs, PICS, JPGs (or most standard image files) onto the default **Patron Picture** field. Once this is done, a new default patron picture is applied. Users can reset to the default patron picture by clicking the **Reset All Patron Pictures** button.



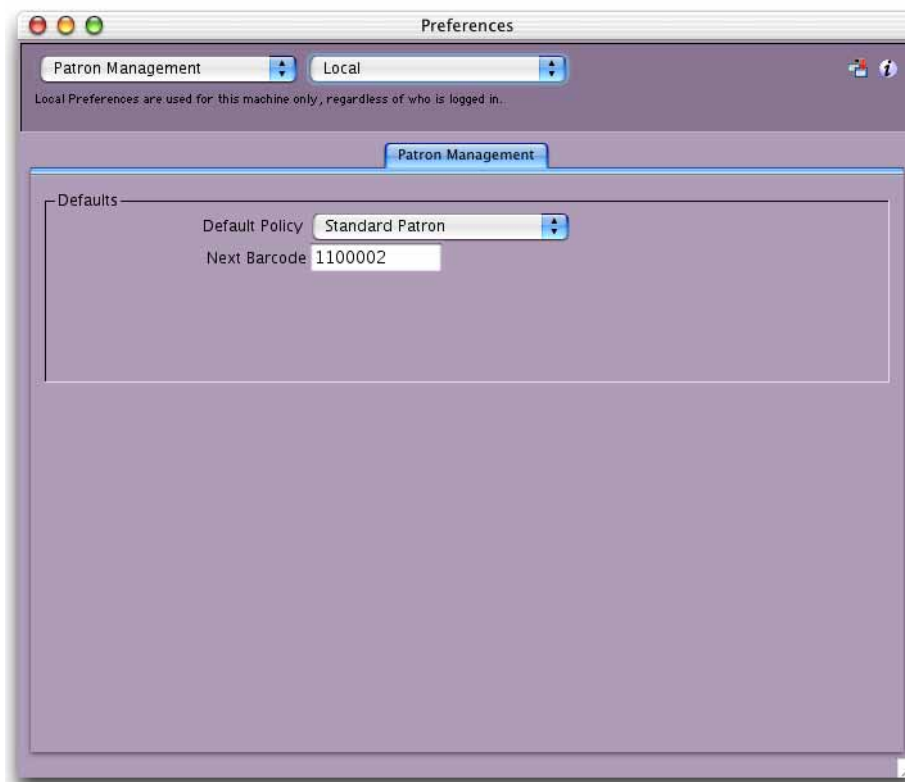
Here are the steps to apply a new default patron picture:

- Step 1. Select which picture you would like to change from the **Gender Types** field on the left-hand side of the screen.
- Step 2. Drag and drop your patron image on to the **Default Patron Picture** field on the right-hand side of the screen. Images can also be pasted into the **Default Patron Picture** field from your operating system standard clipboard.
- Step 3. Click **Save** to apply your changes or **Revert** to discard them.

## Local Patron Management Preferences

**Patron Management** preferences contain both **Global** and **Default Local/Local** preferences.

### Patron Management Tab



**Default Policy**—This drop-down menu displays what the default patron policy will be for newly added members. Use the drop-down menu to select a different default patron policy. If you later remove a patron policy, the **Default Policy** will revert to **Standard Patron**.

**Next Barcode**—The next available patron barcode number. When you create a new patron, Alexandria will assign them the next available barcode (unless you assign a number manually). The default value is 1100000.

You should set this field when you first configure Alexandria, so that any new patrons are assigned a patron barcode number that coincides with your numbering strategy.



# Policy Preferences

## Global Policies Preferences

There are no available **Local** or **Default Local Policies** preferences.

## Patrons Tab

Alexandria Policies help to establish rules on how patrons can use your library, how items circulate, and how circulation periods are computed. Policies are important for circulation purposes, reports, and statistics.

Use the **Policies** preferences to customize these rules for your library. The **Policies** preference window includes preferences for patrons, items, and circulation.

To choose preferences for **Items** or **Circulation**, click on the appropriate tab across the top of the window. The preference window for that category will appear. The subsequent sections describe each category of preferences.

## Patron Policies

Patron policies are the general rules that govern how patrons can use your library. For example, eighth grade students can be given more privileges than second grade students can. Use the **Patron Policies** preference window to customize these rules for your library.

Alexandria automatically creates two patron policies: a **System Patron** policy (SYS) and a **Standard Patron** policy (STD). These policies cannot be removed from the system. The system policy is for “special” patrons with barcodes under fifty. If you don’t assign a policy to a patron, Alexandria uses the **Standard Patron** policy unless otherwise defined in the **Patron Management** preferences.

The screenshot shows the 'Preferences' window with the 'Policies' tab selected. The window title is 'Preferences'. Below the title bar, there are two dropdown menus: 'Policies' and 'Global'. A note states: 'Global Preferences apply to all Alexandria users and applications connected to the Data Station. Changing these preferences will affect all users.' Below this, there are three tabs: 'Patrons', 'Items', and 'Circulation'. The 'Patrons' tab is active. At the top of the Patrons section, there are buttons for 'New', 'Duplicate', and 'Remove', along with left and right arrow buttons. Below these buttons, there is a 'Policy' dropdown menu set to '7', an 'Edit Name' button, and a 'Short Code' field set to '7'. The main area contains various settings for the selected policy, each with a label and a corresponding input field or checkbox. The settings include: 'Maximum number of items checked out' (5), 'Maximum number of items overdue' (2), 'Maximum number of items placed on hold' (5), 'Maximum fine for an overdue item' (\$20.00), 'Number of days patron's card is active' (365), 'Number of days to keep a hold request' (28), 'Number of days to keep an in-stock hold request' (5), 'Total fines alert value' (\$20.00), 'Items are due on' (Any day), 'Use calendar' (Standard), and a 'Force' checkbox. There are also checkboxes for 'Apply period due dates', 'Charge fines on closed days', 'Fines limited by item cost', 'Self-service checkout (SIP2 only)', 'Self-service payment (SIP2 only)', and 'Only allow holds by Copy Library'. At the bottom, there is a 'Policy notes' field with the number '1' next to it.

To add a policy, click on the **New** or **Duplicate** button. The following window appears, requiring information about the new policy.



Enter a **Policy Name** and **Short Code** (between 2-4 characters) then click **OK** to create the new policy using these values. If you click on **Duplicate**, the currently selected policy rules are copied and a **Policy Shortcode** is automatically created. Otherwise, the **Standard Patron** rules are copied. You can then edit these values to customize the newly created policy to meet your needs. **Short Code(s)** and **Policy Name(s)** must be unique.

To remove a policy, click the **Remove** button. You can not remove a policy that is being used by existing patrons. The **Remove** and **Edit Name** buttons are hidden for the **Standard** and **System Patron** policies—as they cannot be removed or renamed.

To better explain how **Patron Policies** work, if a patron exceeds a value that you enter on the **Patrons Policy** window, a warning message appears. For example, if the patron tries to check out more books than the value that is provided in the **Maximum number of items checked out** field, a warning message will appear in the **Circulation** window.

When a warning message appears, some users will have the option to override the policy.

To change the settings for an existing policy, change the values in the fields on the **Patron Policies** preferences window. The following list will explain the fields.

**Policy**—This drop-down menu shows the currently selected policy. Click in the drop-down menu to select other policies you’ve defined for your library. You can edit this name by clicking on the **Edit Name** button, located right beside it.

**Short Code**—These are short names for policies. These are used in reports and other places where long names don’t fit well. **Short Codes** must be between 2-4 characters and must be unique. Default is the first 4 characters of the **Policy Name**—adjusted to make it unique (in case two policies start with the same 4 letters).

**Maximum number of items checked out**—This is the maximum number of items that patrons (under this policy) can check out. COMPanion recommends not setting this number above 50. However, this number corresponds directly to and is determined by the power of your computer system. Default is 5.

**Maximum number of items overdue**—This is the maximum number of items that patrons (under this policy) can have overdue and still be allowed to check out additional items. Default is 2.

**Maximum number of items placed on hold**—This is the maximum number of pending hold requests that patrons (under this policy) can have active at any one time. Default is 5.

**Maximum fine for an overdue item**—This value limits the maximum fine that can be charged for an overdue item. If you mark the **Fines limited by item cost** checkbox, the maximum fine will be either *this* value or the book cost (whichever is lower). Otherwise, this value alone is used. If you want to allow unlimited fines, enter a large value here. Default is \$20.00.

**Number of days patron's card is active**—This value is used as the default card expiration date for newly added patrons. Default is 365 days.

**Number of days to keep a hold request**—Hold requests that exceed this given time limit are automatically removed from the system. Default is 28 days.

**Number of days to keep an in-stock hold request**—In-stock hold requests that expire are automatically removed at the beginning of each day. A notice is prepared so that items may be returned to the shelves, or held for another patron. Default is 5 days.

**Total fines alert value**—If the patron's total fines exceed this value, an alert will appear when this patron becomes the current patron. If you want an alert for any patron with fines, set this value to "\$00.01". If you want alerts for patrons with larger fines, determine that value here. Default is \$20.00.

**Items are due on**—Use this drop-down menu to select **Any day** (meaning item due dates are based on the **Number of days these items can be loaned** option) or **Monday** through **Sunday**. If you select a day of the week from this menu, all loaned items are due back that same day each week. If the day of the week you select happens to fall on a **Closed** day, then Alexandria will try the specified **due on** date again in a week. If next week's **due on** date also happens to be **Closed**, Alexandria will make the item due on the next available **Open** date.

**Force**—If a **due on** date falls on a **Closed** day, this checkbox forces the item to be due on the next open day specified in the **Items are due on** drop-down menu described above. Therefore, if a **due on** date is Thursday, items will *always* be due on a Thursday. Default is unchecked.

**Use calendar**—This field shows the calendar used under this policy. Use the drop-down menu to choose a different calendar for this policy. If you remove a calendar that is being used by a policy, the **Standard** calendar automatically replaces it. Default is **Standard**.

**Apply period due dates**—Choose whether to apply period due dates to patrons under this policy. If you decide to apply period due dates, due dates for items are automatically adjusted at checkout. Default is ON.

**Charge fines on closed dates**—If this box is checked, patrons under this policy are charged fines on both open and closed dates. Otherwise, fines are only charged on dates that the library is open. Default is OFF.

**Fines limited by item cost**—If you check this box, a fine for a particular item is limited to its **Replacement Cost** (if available), **Copy Cost** (if available), or the policy average cost (if available). Otherwise, an item's "value" is set at \$20.00. If you don't set this, fines can exceed the cost of the item. Default is ON.

**Self-service checkout (SIP2 only)**—When checked, patrons under this policy are allowed to check out at SIP2 stations.

**Self-service payment (SIP2 only)**—When checked, patrons are allowed to make payments at SIP2 stations. If this is unsupported by your SIP2 hardware, then this field is ignored.

**Only allow holds by copy library**—When checked, patrons are only allowed to place holds on items from their libraries local collection. An alarm will sound and a warning message will appear if an item is checked in from another library (i.e. items with different library identifications).

**Policy notes**—This field is used to enter a short note about the policy. This is for librarian use only, as Alexandria doesn't use this information. Default is blank.

## Global Policies Preferences

There are no available **Local** or **Default Local Policies** preferences.

### Items Tab

Item policies are the general rules that govern how items are circulated in your library. For example, you can set policies to allow fiction works to be checked out longer than reference works. Use the item policies preference to customize these rules.

Alexandria automatically creates a **Standard Item** policy (STD) for items. The **Standard Item** policy is the default item policy. If you don't assign a policy to an item, it is assigned the **Standard Item** policy.

Click the **Item** tab on the **Policies** preference window to edit item policies.

Preferences

Policies: Global

Global Preferences apply to all Alexandria users and applications connected to the Data Station. Changing these preferences will affect all users.

Patrons Items Circulation

New Duplicate Remove

Policy: EOY Edit Name Short Code: EOY

Loan Period: 14

Grace period allowed before item is subject to fine: 3

☐ Only count open days

Fine rate for these items: \$0.10

Amount of loan fee: \$0.00

Default replacement / Purchase value: \$20.00

Number of times item can be renewed: 1

Maximum reservation period for these items: 14

Open days required between reservations: 0

Hard due date: Jun 6, 2002

☒ Hold requests for these items are allowed

☒ Self-service checkout (SIP2) ☒ Self-service renewal (SIP2)

Call# Mapping

Policy notes: 1

To add a policy, click on the **New** or **Duplicate** button. The following window appears, requiring information about your new policy.

Enter a **Policy Name** and **Short Code** (between 1-4 characters) then click **OK** to create a new policy using these values.

Add Policy

Policy Name

Policy Shortcode

Cancel OK

If you select **Duplicate**, the currently selected policy rules are copied. Otherwise, the **Standard Item** rules are copied. You can then edit the values to customize the newly duplicated policy to meet your needs. **Short Codes** and **Policy Names** must be unique.

To remove a policy, click the **Remove** button. You can not remove any policy that is currently being used by an existing item. Note that the **Remove** and **Edit Name** buttons are not selectable for the **Standard Item** policy.

To better explain how **Item Policies** work, if a patron exceeds any value that you have set in this window, a warning message will appear on the **Circulation** window. For example, if a patron tries to renew more times than the value you have entered in **Number of times item can be renewed**, a warning message will appear.

When a warning message appears, some users will have the option to override the policy.

To change settings for an existing policy, change values in the fields on the **Item Policy** preferences window. The following list explains the fields.

**Policy**—This drop-down menu displays the currently selected policy. Use the drop-down menu to choose from other policies that you've created for your library. You can edit these names by clicking on the **Edit Name** button.

**Short Code**—These are short names for policies and are used in reports and other places where long names don't fit well. **Short Codes** must be between 1-4 characters. Default is the first 4 characters of the policy name.

**Loan Period**—This drop-down menu lets you select the number of days (under this policy) that items can be loaned. **No Loan Period** means that items can never be checked out or taken from the library. **Same Day Check Out** means that items are due back the same day that they are borrowed. If you select **Loan Period**, be sure to specify your loan period in the corresponding field (directly following the **Loan Period** drop-down menu). For example, if you would like a loan period of three weeks, enter 21. Default is 14 days.

**Grace period allowed before an item is subject to fine**—Use this field to set the grace period allowed for overdue items before fines begin to accrue. For example, if you set the grace period for two days, patrons are not charged fines until the third calendar day an item is overdue. At this point, they are charged fines for three overdue days. Unless **Only Count Open Days** is checked, it doesn't matter if the library is open or closed on those days, the grace period is only computed on calendar days.

For easy check in, set the grace period one day longer than your commonly closed periods. For example, if you are commonly closed on Saturday and Sunday set the grace period for three days. Therefore, if the book is due on Friday, and it's turned in through the bookdrop on Saturday, when you check it in on Monday no fines will be charged.

The default grace period is three days.

**Only count open days**—When this box is checked, only open days are used in determining the grace period before an overdue fine is charged.

**Fine rate for these items**—Set the fine rate for items with this policy. The fine rate is computed daily. If you don't charge fines, enter \$0.00. The default setting is \$0.10.



**Amount of loan fee**—If you charge your patrons a fee for checking out an item, this is the field where you set the fee amount for items using this policy. This fee is charged automatically when the item is checked out. The fee is recorded as “Loan Fee for {item title}.” The default setting is \$0 . 00.

**Default replacement/Purchase value**—Set the average replacement cost for items with this policy. This policy is used to assign replacement costs for items if they don’t have an individual replacement cost specified in the copy record. The default is \$20 . 00.

**Number of times item can be renewed**—Enter a value to set the number of times items under this policy can be renewed. If you don’t allow items to be renewed, set the number to 0. The default is 1.

If a patron tries to renew an item that has already been renewed the maximum number of times, a warning message will appear at the **Circulation** window indicating that the patron has exceeded the policy limit for renewals.

**Maximum reservation period for these items**—Set the maximum number of days an item can be reserved. If items aren’t allowed for reservation, set the period to 0 days. If none of the copies allow reservations, the **Reservation** window will not open and a note will be made to the transaction log. If some copies allow reservations and some don’t, the **Reservation** tab of the **Circulation** window will open, but only copies that allow reservations are shown in the copies drop-down menu. The default setting is 14.

**Open Days required between reservations**—If your library requires time to process an item that has been returned, this setting will enforce the processing time between reservations. For example, certain equipment may need to be calibrated after each use. If the calibration time takes two days, and you enter the value “two days” in this preference, Alexandria will make sure that reservations are separated by at least two days. Default is 0 days.

**Hard due date**—Using this policy, you can set a fixed due date for all items. If the date entered here is *after* today’s date, it is used as your due date. Otherwise, Alexandria computes a due date according to other policy settings. Default is blank.

**Call# Mapping**—Clicking this button opens a small **Call Number Range** window. This window allows users to input lists of call number ranges which can be used to link import items (i.e. *on import only*) to certain policies within your library. You can enter a value to indicate any call numbers beginning with letters of the alphabet (e.g. ‘ABC’) or a numeric range to indicate any call numbers beginning with a numeric range (e.g. ‘300-310’). In this example, values like 300, 300.12, 305.8, and 310.324 would be matched.

**Hold requests for these items are allowed**—Check this box to allow patrons to place hold requests on items. If you don’t check this box, patrons cannot place hold requests on items under this policy. Default is ON.

**Self-service checkout (SIP2 only)**—When checked, items under this policy are allowed to be checked out at SIP2 stations.

**Self-service renewal (SIP2 only)**—When checked, items under this policy are allowed to be renewed at SIP2 stations.

**Policy notes**—Enter notes about this policy. Notes are only for the librarian’s use, they are not used for any policy calculations. Default is blank.

## Global Policies Preferences

There are no available **Local** or **Default Local Policies** preferences.

### Circulation Tab

Circulation policies are the specific rules that are used when patron transactions are performed. Alexandria creates a circulation policy for every combination of patrons and items, using the values that have been entered into individual patron and item policy windows.

Use the **Circulation Policies** preference to customize these settings with your circulation exceptions. For example, you can configure a circulation policy to allow teachers to check out reference books, but not students.

Click the **Global Circulation** tab on the **Policies** preference window to change circulation policies.

The screenshot shows the 'Preferences' window with the 'Policies' tab selected. The 'Global' policy is chosen. The 'Circulation' sub-tab is active. The window displays settings for a specific Patron (7) and Item (EOY). The settings are organized into two columns. The left column contains: 'Maximum number of items checked out' (5), 'Maximum number of items overdue' (2), 'Maximum number of items placed on hold' (5), 'Maximum fine for an overdue item' (\$20.00), 'Number of days patron's card is active' (365), 'Number of days to keep a hold request' (28), 'Number of days to keep an in-stock hold request' (5), and 'Total fines alert value' (\$20.00). The right column contains: 'Loan Period' (14), 'Grace period allowed before item is subject to fine' (3), 'Fine rate for these items' (\$0.10), 'Amount of loan fee' (\$0.00), 'Average replacement cost for these items' (\$20.00), 'Number of times item can be renewed' (1), 'Maximum reservation period' (14), 'Open days required between' (0), and 'Hard due date' (Jun 6, 2002). Below these are several checkboxes: 'Fines limited by book cost' (checked), 'Apply period due dates' (checked), 'Charge fines while the library is closed' (unchecked), 'Self-service checkout (SIP2 only)' (checked), 'Self-service payment (SIP2 only)' (checked), 'Only allow holds by Copy Library' (unchecked), 'Hold requests for these items are allowed' (checked), 'Self-service checkout (SIP2 only)' (checked), 'Self-service renewal (SIP2 only)' (checked), 'Use calendar' (Standard), and 'Items are due on' (Any day). A 'Policy notes' text area is at the bottom left.

You can edit a **Circulation** policy by selecting a **Patron** and **Item** policy from the corresponding drop-down menus. For example, you can select **Standard Patron** and **Standard Item** to create a circulation policy for this combination. This policy will contain the rules that are used when a standard patron performs a transaction on a standard item.

Each **circulation policy** is a combination of one patron and one item policy. The original settings for a circulation policy come from combining these patron and item policies.

- If you change a patron or item policy, the default circulation policy (which is a combination of these two policies), is changed to match *unless* you've entered an exception into the **Circulation Policy** window. If you enter an exception, it will be used rather than the standard patron or item policy values.
- If you modify settings in a circulation policy, those values are used until you change them back to the default values. Patron and item policies are not affected by changes you make to the circulation policy.

The following examples show how a policy change takes effect:

**Example 1**—A loan period is fourteen days under a particular item policy and you have *not* changed this value in the **Circulation Policies** window. If you change the setting in the **Item Policy** window from fourteen to twenty-one, all circulation policies using *this* item policy will be updated.

**Example 2**—A loan period is fourteen days under a particular item policy but you *changed* this value in the **Circulation Policies** window to a custom setting to allow teachers a loan period of thirty days. If you change the setting in the **Item Policy** window from fourteen to twenty-one, the thirty-day setting remains in the customized circulation policy; only those records you *didn't* customize would be changed.



## Circulation Policies

**Patron**—Use this drop-down menu to modify circulation policies for these specific patron types. Users need only modify settings that are exceptions to the normal policy settings.

**Maximum number of items checked out**—The maximum number of items that the patron type (specified in the **Patron** drop-down menu above) can have out at one time. Default is 3.

**Maximum number of items overdue**—The maximum number of items that patrons can have overdue before new item checkout is disallowed. Default is 1.

**Maximum number of items placed on hold**—The total number of items that patrons can have placed on hold. Default is 2.

**Maximum fine for an overdue item**—This is the total amount that an overdue item can reach before it no longer accrues fees. Default is \$20.00.

**Number of days a patron's card is active**—How long (in days) that patron library cards are valid. Usually, this is one year. Default is 365.

**Number of days to keep a hold request**—The number of days a patron's hold request will stay active. Default is 28.

**Number of days to keep an in-stock hold request**—The number of days a patron's in-stock hold will stay active. Default is 7.

**Total fines alert value**—The total amount of fines that a patron can accrue before an alert window will appear during checkout. Default is \$25.00.

**Fines limited by book cost**—When checked, fines for a particular item can not exceed it's total purchase cost. Default is checked.

**Apply period due dates**—Set up a **Period Due** date in the **Calendars Preference** window (by clicking twice on an empty calendar day). **Period Due** dates are fixed due dates that require items to be returned to the library, regardless of the loan period or any other circumstances. You may have as many **Period Due** dates as you require for your library. Default is checked.

**Charge fines while the library is closed**—If checked, item fines will continue to accrue even on library closed dates (e.g. weekends and holidays). Default is unchecked.

**Self-service checkout (SIP2 only)**—When checked, SIP2 self-service checkout will be allowed for this patron group. Default is checked.

**Self-Service payment (SIP2 only)**—When checked, self-service payment will be allowed for this patron group at SIP2 stations. Default is checked.)

**Only allow holds by Copy Library**—If checked, patrons may only place holds on items from their local collection. An alarm will sound and a warning message will appear if an item is checked in from another library (i.e. items with different library identifications).

**Policy Notes**—Enter any general information or reminders for your set of combined policies.

**Item**—Use this drop-down menu to modify circulation policies for this particular item type. Users need only modify settings that are exceptions to the normal item policy settings.

**Loan Period**—This drop-down menu lets you select the number of days (under this policy) that items can be loaned. **No Loan Period** means that items can never be checked out or taken from the library. **Same Day Check Out** means that items are due back the same day that they are borrowed. If you select **Loan Period**, be sure to specify your loan period in the corresponding field (directly following the **Loan Period** drop-down menu). For example, if you would like a loan period of three weeks, enter 21. Default is 14 days.

**Grace period allowed before the item is subject to fine**—Specify the number of days this item type can be borrowed past its loan period (see above) before fines begin to accrue. Default is 1.

**Only count open days**—Check this box if you want the grace period (see above) to only count open days. For example, if a patron returns an item after hours on the last of his grace days, fines will begin to accrue the following day, regardless if this day is **Closed** (e.g. a holiday or weekend) or not. Default is unchecked.

**Fine rates for these items**—The fine amount that is charged to the patron for every day that the item is overdue. Default is \$1.00.

**Amount of loan fee**—If your library charges a fee to check out items (i.e. renting), specify the price here. Default is \$0.00.

**Average replacement cost for these items**—Average cost for this specific item type. This is the amount charged to a patron when an item is lost, never returned, or irrecoverably damaged. This amount can be changed individually per item. Your **Items** preferences determine whether fees/fines are allowed to exceed this value. Default is \$20.00.

**Number of times item can be renewed**—Use this field to specify the number of times a patron can renew the same item. Default is 1.

**Maximum reservation period for these items**—Set the maximum number of days patrons can make reservations for these specific item types. Default is 5

**Open days required between reservations**—Sets a buffer period of open days before a reservation so that items are processed and ready to distribute to the next patron in waiting. If a patron tries to check out a book whose reservation period coincides with their loan period, a warning message will appear and that patron's loan period will be cut short. Default is 1.

**Hard due date**—Date in which all items (i.e. *everything*) is required back to your school or library. Generally, this date is set for the end of a school year, end of semester, or quarter changes.

When you enter any type of specially formatted information such as dates you can enter values in a wide range of formats. For example, you can enter the date December 1, 2004 as: "Dec 1, 2004" or "12/1/04"<sup>1</sup> or "12.1.04" or "12 1 04". If the year is 2004, you can just enter "12/1". If the current month is December, you can just enter "1". Default is blank.

**Hold requests for these items are allowed**—Hold requests for this item type will be allowed. Default is checked.

---

1. When you enter a two digit date, values between 0-30 are assumed to be 2000-2030 and values between 31-99 are assumed to be 2031-2099.

**Self-service checkout (SIP2 only)**—When checked, SIP2 self-service checkout will be allowed for this patron group. Default is checked.

**Self-service renewal (SIP2 only)**—When checked, self-service renewal will be allowed for this item type at SIP2 stations. Default is checked.

**Use calendar**—This is the calendar used for the options below. All changes made (closed dates, period due dates, etc.) will be generated by Alexandria using this specific calendar. Default is **Standard**.

**Items are due on**—Use this drop-down menu to select **Any day** (meaning item due dates are based on the **Number of days these items can be loaned** option) or **Monday** through **Sunday**. If you select a day of the week from this menu, all loaned items are due back that same day each week. If the day of the week you select happens to fall on a **Closed** day, then Alexandria will try the specified **due on** date again in a week. If next week's **due on** date also happens to be **Closed**, Alexandria will make the item due on the next available **Open** date.

**Force**—If a **due on** date falls on a **Closed** day, this checkbox forces the item to be due on the next open day specified in the **Items are due on** drop-down menu described above. Therefore, if a **due on** date is Thursday, items will *always* be due on a Thursday. Default is unchecked.



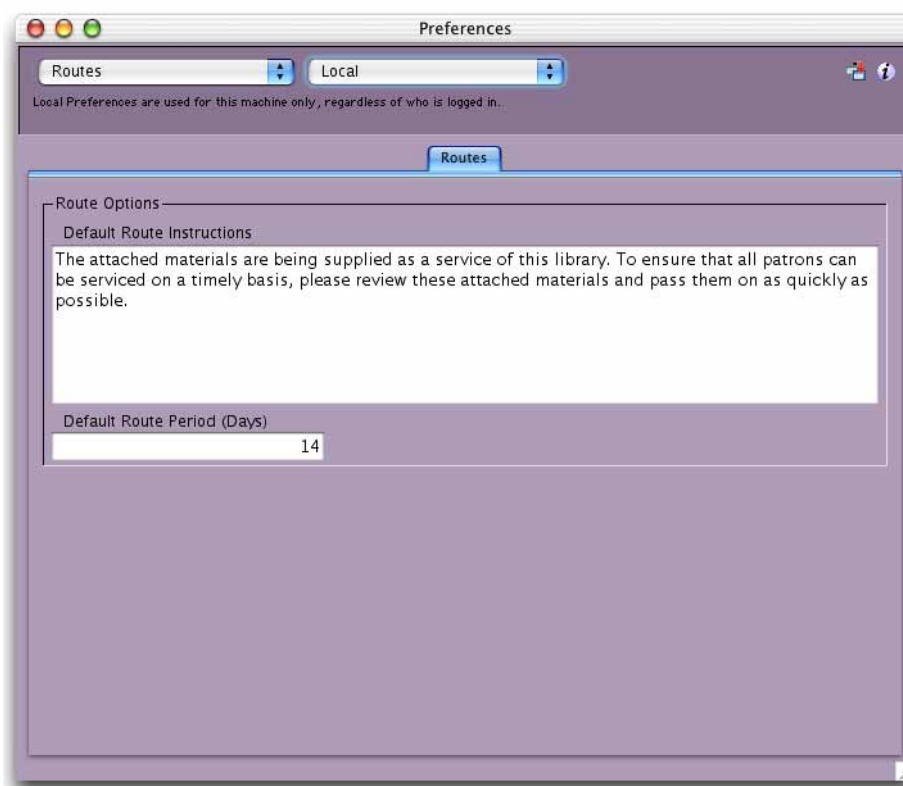
# Routes Preferences

## Local Routes Preferences

There are no available **Global Routes** preferences.

## Routes Tab

Allows the librarian to specify default **Route** preferences. You can also create new and individual route lists with different instructions (*see “Routes Management” on page 360*).



**Default Route Instructions**—The default text for new routes. Default is “The attached materials are being supplied as a service of this library. To ensure that all patrons can be serviced on a timely basis, please review these attached materials and pass them on as quickly as possible.”

**Default Route Period (Days)**—Sets the new default route period. Default is 14 days.



# SIF Preferences

## Global SIF Preferences

There are no available **Local/Default Local SIF** preferences.

### - N O T E -

The **SIF** protocol is an optional feature of Alexandria. You must have purchased a **SIF** license in order to use this feature.

## What is SIF?

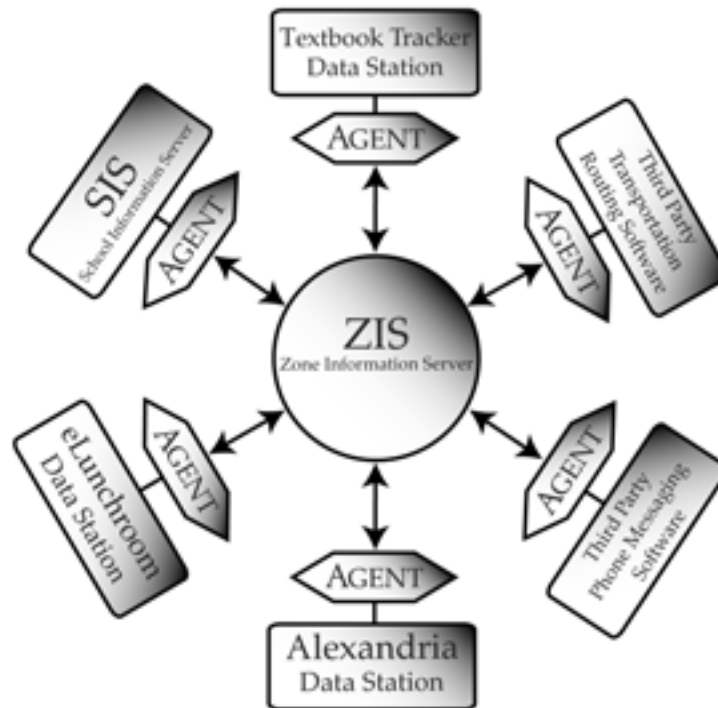
One of the biggest challenges facing the K-12 community is the lack of software interoperability (i.e. sharing of database information). In other words, most school districts have a series of software applications which all require the same data, but have no way to talk to each other. Educators and administrators consistently lament the fact that their financial management, administration, library automation, transportation routing, telephone messaging, and cafeteria software applications don't work together (i.e. communicate or share data formats). For example, a school district might need to create a report using data from multiple school software applications and deliver this report over the internet, confident that their information remains secure. SIF solves these problems by allowing different third party software applications to communicate, dramatically reducing the redundancy of data entry so that administrators can maximize staff and faculty time and are able to better focus on education.

The **Schools Interoperability Framework** (SIF) is *not* a product and will not be sold as such, rather, it's an industry-supported technical protocol that ensures that diverse primary and secondary (K-12) instructional and administrative software applications share information (data formats) and work together seamlessly, saving tremendous amounts of time and productivity. When different third party software applications can communicate with each other, access one another's database, resources, and tools, a school district can more effectively serve the needs of its users<sup>1</sup>.

1. Information on this page was sourced and adapted from the following internet resources: [www.thejournal.com](http://www.thejournal.com), [www.microsoft.com](http://www.microsoft.com), and [www.sifinfo.org](http://www.sifinfo.org).

## How does SIF work?

A critical component of SIF is the Zone Integration Server (ZIS) which serves as the data integration broker (or hub) between disparate software applications that support the SIF protocol. The ZIS is an invisible courier that reliably delivers information from one source to several destinations. The ZIS does not do this blindly, it is aware of the data formats that are of interest to these differing applications, aware of what they're privileged to send and receive, and aware of the security requirements for each and every application, delivering secure and reliable message broker services.



Third party vendors can connect their applications to one another via the ZIS by writing 'agents'. These agents perform the task of brokering communications between existing applications and the ZIS. These agents are the boundary where translation between the application's internal data format and SIF format occurs. SIF is not limited to a particular operating system or platform.<sup>1</sup>

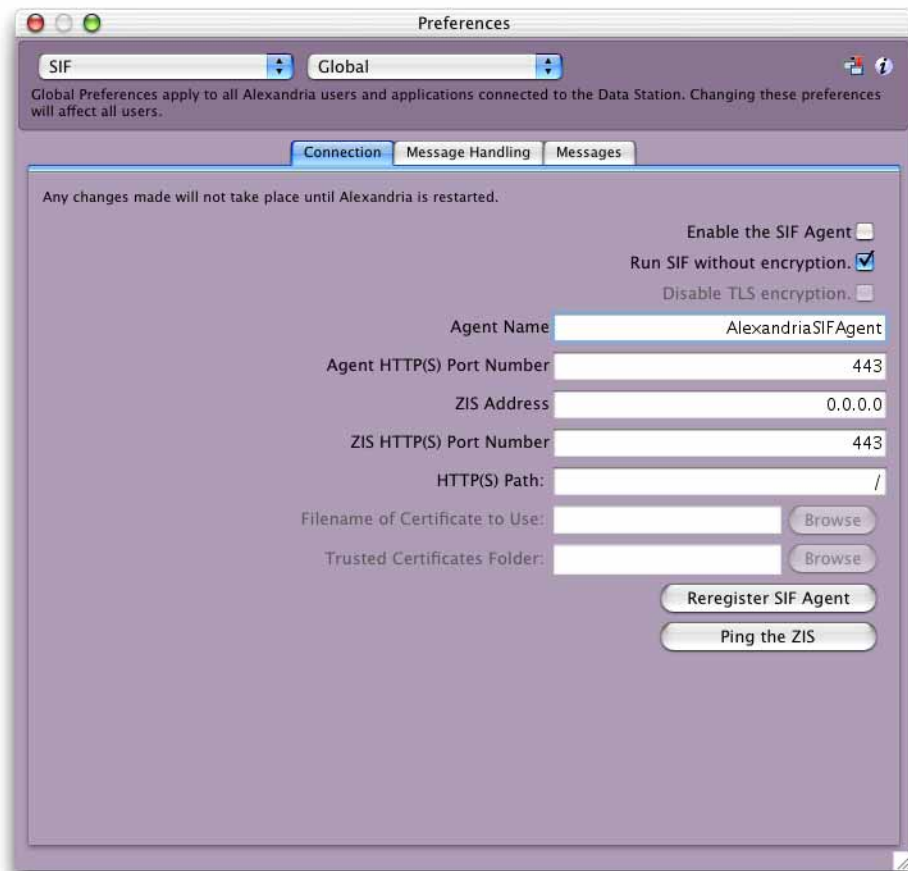
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1. Information on this page was sourced and adapted from the following internet resources: [www.thejournal.com](http://www.thejournal.com), [www.microsoft.com](http://www.microsoft.com), and [www.sifinfo.org](http://www.sifinfo.org).



## Connection Tab

Any changes made to the **SIF Connection** tab fields will not take place until Alexandria has been restarted.



**Enable the SIF Agent**—This will disable/enable Alexandria’s **SIF** services. Without the SIF agent enabled, there won’t be any communication with the ZIS system resources (e.g. the SIF agent port, RAM, CPU, etc).

**Run SIF Without Encryption**—SIF can run in two modes: *with* encryption or *without* encryption. However, since it can’t run in both modes at the same time, use this check box to decide if you will disable/enable encryption. Unless necessary, running SIF without encryption is *not* recommended; whatever the ZIS is doing, Alexandria should be doing as well.

**Disable TLS Encryption**—However unlikely, it is possible for there to be communication errors with TLS encryption. Unless the user experiences these types of errors, they should *always* keep TLS encryption enabled (obviously this preference is ignored if the **Run SIF Without Encryption** feature is disabled).

**Agent Name**—The name that the Alexandria SIF Agent is known by to all other SIF agents and the Zone Integration Server (ZIS). For multiple libraries in the same zone, name should be unique; otherwise, there is no need to change it from the default.

**Agent HTTP(S) Port Number**—The TCP/IP port that Alexandria listens with. This is the port that the ZIS will connect to. Under OSX, the default port requires that the user has administrative privileges on the computer (usually requires logging in as root).

**ZIS Address**—This is the internet address when the ZIS is located. This can be either an IP or resolvable address. The protocol header should be left out. Refer to your ZIS installation notes for this address.

**ZIS HTTP(S) Port Number**—The TCP/IP port that the ZIS listens on, and the one that you need to connect with. Refer to your ZIS installation notes for this number. If there is no mention of this port number, then the default will most likely work.

**HTTP(S) path**—This is useful if your ZIS is running underneath a web server. This path can be obtained by looking at the full address where the ZIS server is located. This path will be found after the address and port number (with all leading and trailing slashes).

**Filename of certificate to use**—This should point to a directory containing the certificate (in PEM format) that is trusted by the ZIS.

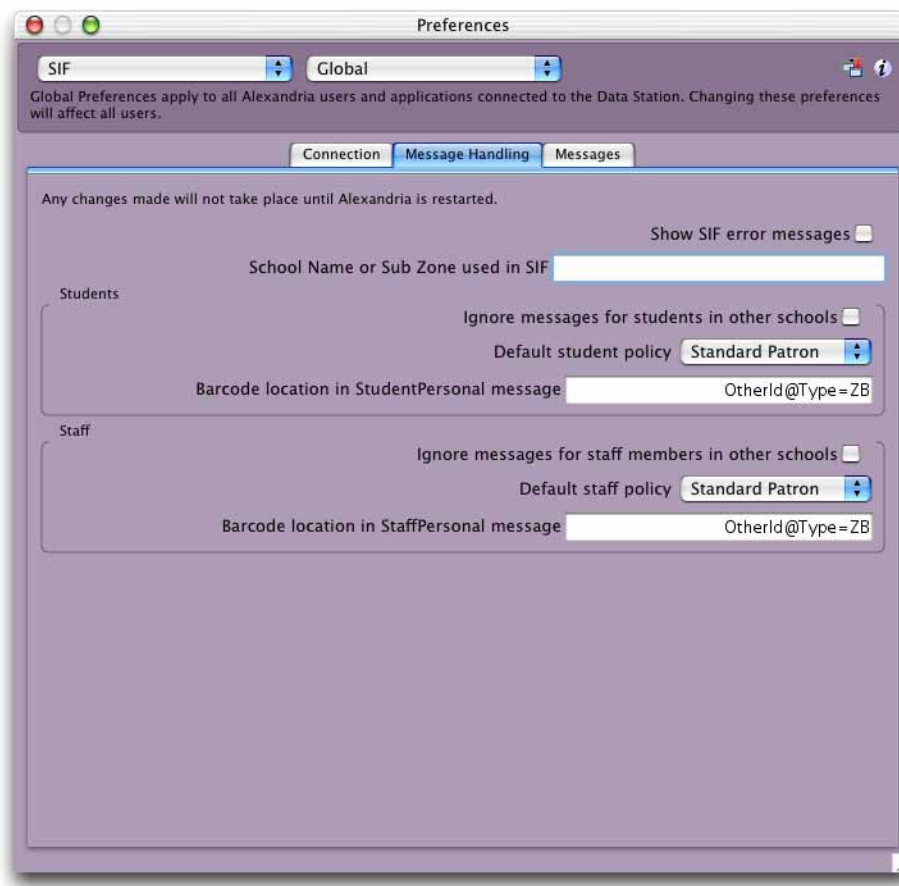
**Trusted certificates folder**—This should point to a directory containing the ZIS certificate and any other certificates in its certificate chain.

**Reregister SIF Agent**—Each agent sends a `SIF_Register` message to become part of the 'zone'. The ZIS then sends an acknowledgement (or `SIF_ACK`) message to confirm the registration.

**Ping the ZIS**—Sends a request to the ZIS and awaits an answer to make sure that it is on-line and available.

## Message Handling Tab

Any changes made to the **SIF Connection** tab fields will not take place until Alexandria has been restarted.



**Show SIF error messages**—This preference will display all the error messages that Alexandria receives from the ZIS in the **Circulation** window's **Transaction Log**. Even if this box remains unchecked, error messages will be saved to the transaction log file that is kept inside the Alexandria **Logs** folder.

**School Name or Sub Zone for this Destination**—To ignore students from other schools, indicate in this field the school name or subzone that will be embedded into the OtherID of type ZS in the StudentPersonal object.

## Students

**Ignore messages for students in other schools**—Check this box if you have multiple Data Stations running within a zone (e.g. one Data Station per school in a school district). Using SIF, if a student is created, deleted, or changed, a message will go out to every SIF agent that is configured to receive student messages. However, if this box is checked, any student whose school (or subzone) doesn't match the **School Name or Sub Zone used in SIF** field (see below) will ignore the incoming message.

**Default student policy**—When a student is added via SIF, this is the policy that they will be assigned.

**Barcode location in StudentPersonal message**—Currently there are multiple ways for SIF implementers to put a student ID in the SIF message. Any one of these could be the barcode. This field allows the technical personnel who install the SIF zone to tell Alexandria which is the correct one. If an `OtherID` of type `ZA` is in the `Student_Personal` objects, this is seen as the school for that student.<sup>1</sup>

## Staff

**Ignore messages for staff members in other schools**—Check this box if you have multiple Data Stations running within a zone (e.g. one Data Station per school in a school district). Using SIF, if a staff member is created, deleted, or changed, a message will go out to every SIF agent that is configured to receive staff member messages. However, if this box is checked, any staff member whose school (or subzone) doesn't match the **School Name or Sub Zone used in SIF** field (see below) will ignore the incoming message.

**Default staff policy**—When a staff member is added via SIF, this is the policy that they will be assigned.

**Barcode location in StaffPersonal message**—Currently there are multiple ways for SIF implementers to put a staff member ID in the SIF message. Any one of these could be the barcode. This field allows the technical personnel who install the SIF zone to tell Alexandria which is the correct one. If an `OtherID` of type `ZA` is in the `Staff_Personal` objects, this is seen as the school for that staff member.<sup>2</sup>

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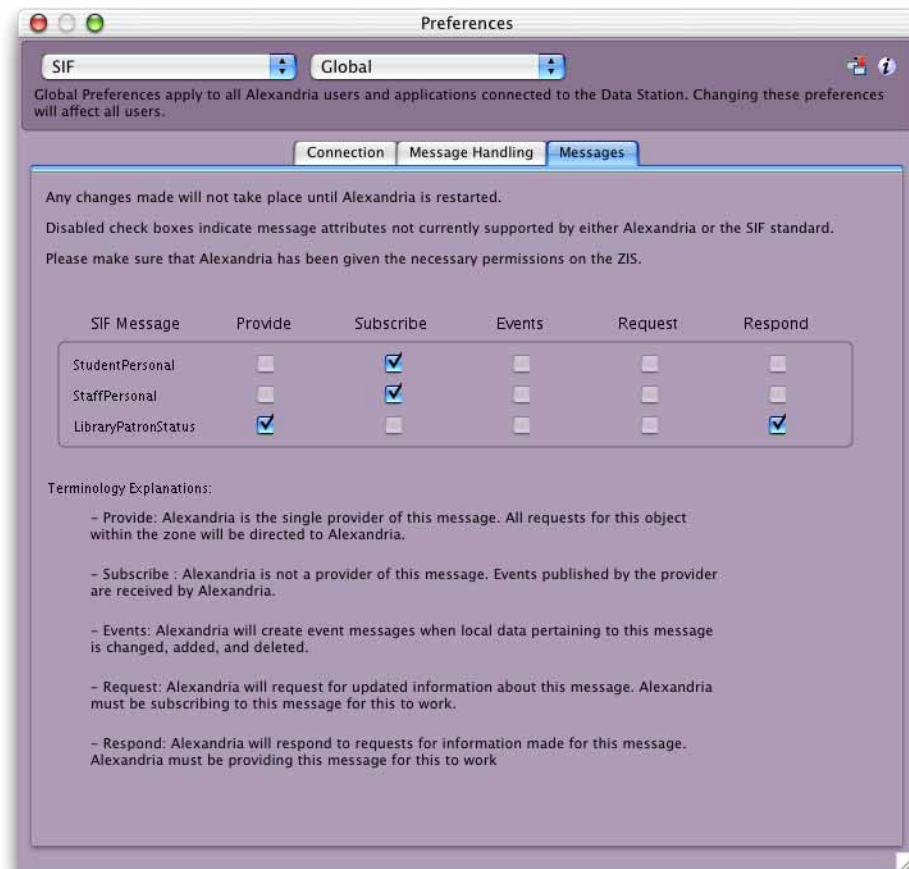
1. Format: **Element/subelement/sub-subelement@attribute=value**. Attribute is optional. The text of the matching element is used for the barcode. Default is `OtherID@type=ZB`.

2. Format: **Element/subelement/sub-subelement@attribute=value**. Attribute is optional. The text of the matching element is used for the barcode. Default is `OtherID@type=ZB`.

## Messages Tab

Disabled (grayed out) check boxes indicate that certain message attributes are not currently supported by either Alexandria or the SIF standard.

Please make sure that Alexandria has been given the necessary permissions on the ZIS.



## Terminology Explanations<sup>1</sup>

**Provide**—Alexandria is the single provider of this message and all requests for this object within the SIF zone will be directed to Alexandria. Checking this box indicates that Alexandria wishes to serve as the provider of a data object and sends a `SIF_Provide` message to the ZIS. The ZIS enters this information into the **Access Control List (ACL)**.

**Subscribe**—Checking this box means that Alexandria wishes to subscribe to a certain data object and sends a `SIF_Subscribe` message to the ZIS. In other words, events published by the provider (usually the SIS) are received by Alexandria.

**Events**—Alexandria will create event messages when local data pertaining to this message is changed, added, and deleted. For an example, let's say that the SIS application is the new provider of the `Student_Personal` data object and the other applications are subscribers. When a new student is added to the SIS application, a `SIF_Event` is generated. The `SIF_Event` informs all of the subscribing applications about the addition, and each application in turn processes the new student into their database.

**Request**—Alexandria will make requests for updated information about this message. Alexandria must be subscribing to this message for this to work. For an example, let's say that the SIS application is the provider of the `Student_Personal` data object and the other applications are subscribers. Now let's suppose that Alexandria has just been installed and needs to be populated with existing students in the SIS. Alexandria, through its Agent, sends a request to obtain all student records.

**Respond**—Alexandria will respond to request for information made for this message. Alexandria must be providing this message for this to work. For example, upon receiving an `SIF_Request`, the SIS application Sends a `SIF_Response` to the ZIS containing all of the student record information. The ZIS forwards the request to the requester (Alexandria, in this instance). Alexandria is now synchronized with the SIS without the need for manual re-entry of all the student records.

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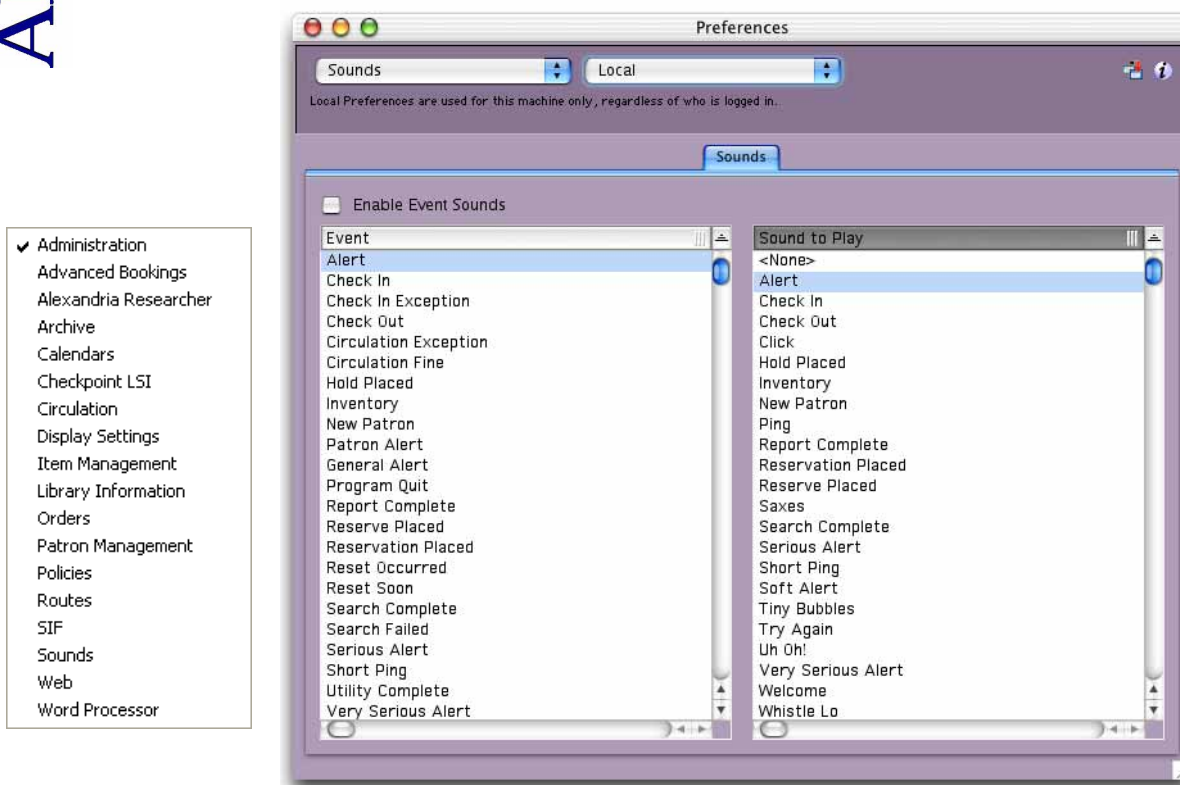
1. Information on this page was sourced and adapted from the following internet resources: [www.thejournal.com](http://www.thejournal.com), [www.microsoft.com](http://www.microsoft.com), and [www.sifinfo.org](http://www.sifinfo.org).

# Sounds Preferences

## Local Sounds Preferences

### Sounds Tab

Use this preference to select what sounds will play when a certain event occurs.



Click on an event to select (highlight) it, then click on the sound that you want to play when that event occurs. For example, if you want the sound of a saxophone to play when a book is checked in, choose **Check In** from the **Event** column and choose **Saxes** in the **Sound to Play** column.

### - H I N T -

If you don't want Alexandria to play sounds, remove the check from the **Enable Event Sounds** checkbox. Default is **ON**.

Use the **Restore Defaults** button to reset all sounds to their default values.





# Web Preferences

## Global Web Preferences

There are no available **Local** or **Default Local Web** preferences.

### - N O T E -

Alexandria Web is an optional feature of Alexandria. You must have purchased a separate license to get full use from this feature.

## Web Tab

If you have licensed **Alexandria Web**, all of these preference options will become available to help customize your library's web interface.

- ✓ Administration
- Advanced Bookings
- Alexandria Researcher
- Archive
- Calendars
- Checkpoint LSI
- Circulation
- Display Settings
- Item Management
- Library Information
- Orders
- Patron Management
- Policies
- Routes
- SIF
- Sounds
- Web
- Word Processor

- ✓ Administration
- Advanced Bookings
- Alexandria Researcher
- Archive
- Calendars
- Checkpoint LSI
- Circulation
- Display Settings
- Item Management
- Library Information
- Orders
- Patron Management
- Policies
- Routes
- SIF
- Sounds
- Web
- Word Processor

## Web

**Port ID (usually 80)**—Sets the port number used for web interface (this is usually 80). Default is 8080.

**Institution Logo**—Type the name of an image file contained in the **Web** folder of your main Alexandria directory (e.g. “logo.gif”). If entered correctly, this image will appear on the top left-hand side of your Alexandria Web browser window. This is useful if you want to display your school mascot or library insignia on your Alexandria Web page.

**Institution Logo Link**—Enter the URL that you’d like your **Institution Logo** (detailed above) hyperlinked to (e.g. “http://www.goalexandria.com”).

**Institution Link Description**—The friendly name of your institution’s web page, hyperlinked using the **Institution URL** listed below.

**Institution URL**—Enter the URL for your institution’s home page (for example, “http://www.goalexandria.com”).

**Heading Text**—Allows you to customize the text shown at the top center of you Alexandria Web page (for example, “COMPanion’s School Library”).

**Footing Text**—Allows you to customize text shown at the bottom left-hand side of your Alexandria Web page, directly below your **Institution URL** hyperlink.

**Default Search**—Use this drop-down menu to select the default search interface for Alexandria Web searching. Your choices are **Simple**, **Boolean**, **Browse**, **Study Program**, **Z39.50** and **Explore**. Default is **Simple**.

**Maximum Search Results**—This drop-down menu allows you to set the maximum number of items to return during an Alexandria Web search. Valid ranges are from 50 to 500. The default is **500**.

**Session Timeout**—This drop-down menu allows you to set how many minutes the Alexandria Web browser can remain idle before logging out the current user and resetting the web browser homepage. Default is **20**.

**Details Display**—This drop-down menu allows the user to determine if the search results are returned in a **Simple** or **Standard** display. Default is **Standard**.

**Default Study Program**—This drop-down menu allows you to choose the default study group that patrons will use during an Alexandria Web search. Default is **Any**.

**Max Results/Page**—This drop-down menu allows you to set the maximum number of search results to display per page during an Alexandria Web search. Valid ranges are from 10 to 100. The default is **15**.

**Display Log Messages**—This check box will only be available if you have a limited **Alexandria Web** user license. Say, for example, your **Web** license only allows 5 simultaneous patron connections; if an additional patron tries to log on to **Alexandria Web** while there are already five connected, then their connection will be refused. When this box is checked, if a patron is refused, a note will be made to the **Transaction Log**. When this box is not checked, the patron will still be refused, but a note to the **Transaction Log** will not be made.

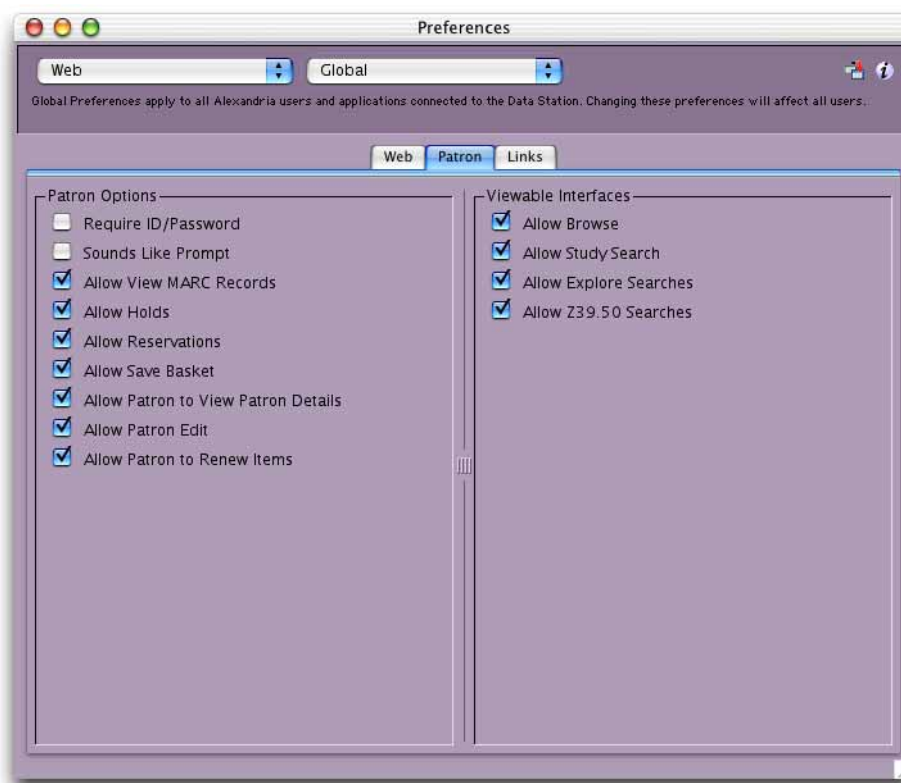
✓ Standard  
Simple

✓ Any  
Accelerated Reader  
Reading Counts  
Other

## Global Web Preferences

### Patron Tab

The **Patron Web** preference tab determines how patrons are able to use the Alexandria Web browser for searching and general circulation purposes. You may also keep a certain search interface from appearing on Alexandria **Web**; do this by removing the checkmark next to its name from the **Viewable Interfaces** field. Please note, this will *disable* this search interface and remove its search tab from the top of the Alexandria Web browser window.



### Patron Options

**Require ID/Password**—If checked, Alexandria Web access will require a patron barcode and password. When unchecked, every internet user in the world has the ability to search your catalog collection via your IP address. The default is unchecked.

**Sounds Like Prompt**—Check this box if you want a **Sounds Like** button to appear when a search finds no matches. The *sounds like* search sometimes finds matches when other searches do not. The default setting is unchecked.

**Allow View MARC Records**—When unchecked, the **View MARC Record** hyperlink that appears on the bottom of a successfully searched item's detail window is disabled. Default is checked.

**Allow Holds**—When unchecked, hold requests over the web are disabled. Alexandria Web hold requests will require a patron barcode and password. The Default is checked.

**Allow Reservations**—When unchecked, reservation requests over the web are disabled. Alexandria Web reservation requests will require a patron barcode and password. Default is checked.

**Allow Save Basket**—When unchecked, the web **Save Basket** is disabled.

**Allow Patron To View Patron Details**—This checkbox allows patrons to check their status from an Alexandria Web browser. The patron status report includes information about what items they have checked out, on hold, and reserved. The default setting is checked.

**Allow Patron Edit**—When unchecked, patrons are unable to edit their personal information using Alexandria Web. Patron editing require a patron barcode number and password. If this setting is enabled, patrons will be able to change their own password, address, phone number, and email address. Default is checked.

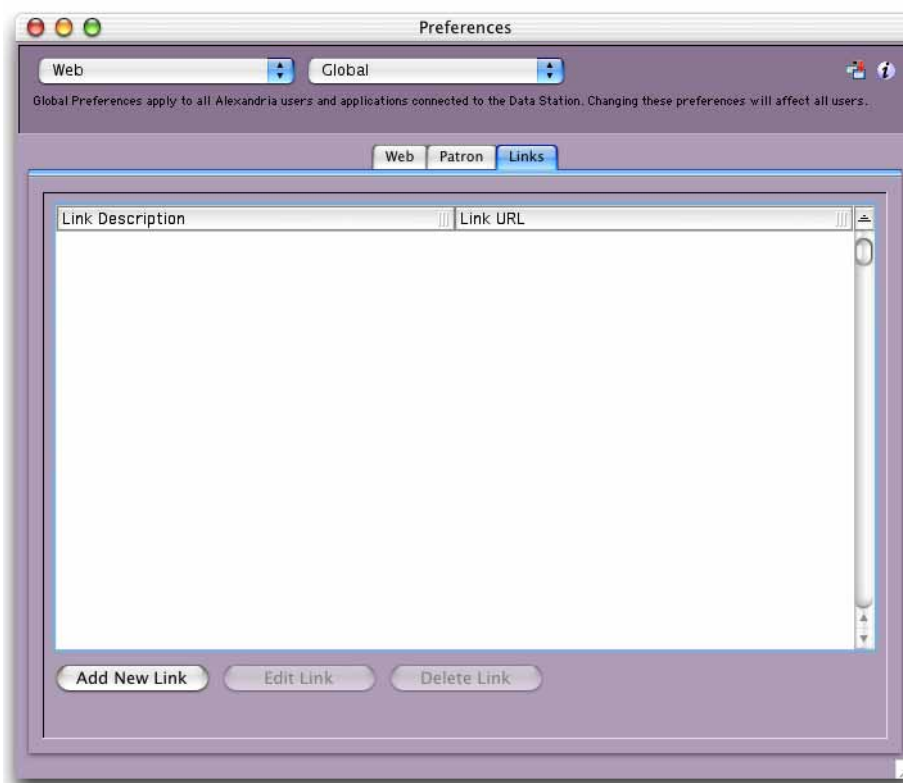
**Allow Patron Renew Items**—When unchecked, patron renewals (of any items that the patron has checked out) will be disabled over the web. Patron renewals require a patron barcode number and password. Default is checked.

Patron
<a href="#">Log In</a>
Last 5 Searches
Empty
Last 5 Items
Empty
Save Basket
<a href="#">Save Basket (0)</a>
Bulletin Board
<a href="#">Bulletins (0)</a>
Web Links
<a href="#">Web Links</a>
Library Information
<a href="#">Library Information</a>
Help
<a href="#">Help Page</a>
Language
English ▾

## Global Web Preferences

### Links Tab

Use the **Links** tab to give patrons specific URL ("http://") links to material they might be interested in. These links can be accessed directly from your Alexandria Web browser. Using the menu located on the left-hand side of your Alexandria Web page, click the **Web Links** hyperlink. A new internet browser window will open and contain all the websites that you've specified from the preference window below.



Click the **Add New Link** button to input your URL ("http://") addresses. The **Edit Web Link** window will then appear. From this window, you may add as many websites as you desire. For your convenience, the window will remain open until you click the **Cancel** button.

To change an erroneously entered link, select (highlight) it from the **Link Description** field and click the **Edit Link** button. Alternately, you can double-click on a link description to open the **Edit Web Link** window. Make changes to the link as you see fit. When you are finished, click **Save**. To exit the window without saving your changes, click **Cancel**.

To remove an unwanted link, select (highlight) it from the **Link Description** field and click the **Delete Link** button. There is *no* undo for link deletion. Make sure you are certain that you want the link permanently destroyed before clicking delete.

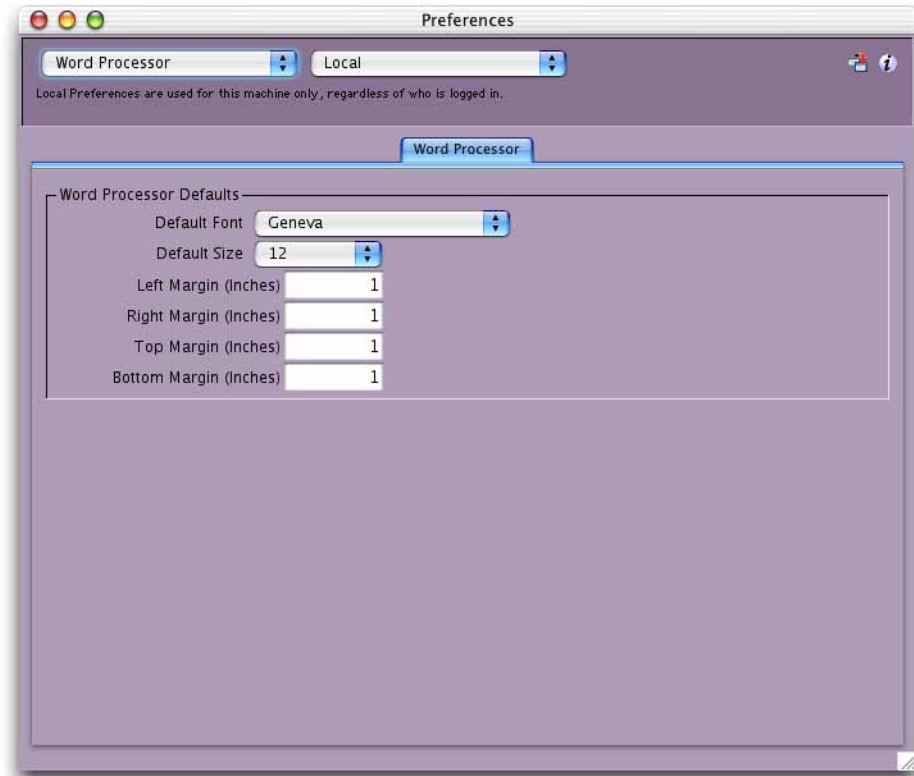


# Word Processor Preferences

## Local Word Processor Preferences

### Word Processor Tab

This preference window is used to set defaults when a new word processor document is opened.



**Default Font**—Selects the default font selection. Default is **Geneva**.

**Default Size**—Selects the default font size. Default is 12 point.

All margins are from the edge of the paper. Since most printers can't print to the very edge of the paper (called full-bleed), you should use a margin of at least ". 25" inches.

**Left Margin**—Sets the default left margin. Default is "1" inch.

**Right Margin**—Sets the default right margin. Default is "1" inch.

**Top Margin**—Sets the default top margin. Default is "1" inch.

**Bottom Margin**—Sets the default bottom margin. Default is "1" inch.





# Patron Management

This chapter includes a general description of managing patrons using the **Patrons** window and how to add, remove, modify, browse, find, and display patron information (see “Patron Management Preference” on page 137).

## Patron Management Window

The **Patrons** window displays information about patrons in your library. To display the **Patrons** window, select **Patrons** from the **Show** menu.



The top portion of the window contains primary information about the current patron. This includes the patron **Barcode**, **Policy**, **Status**, **Sex**, the patron’s sequence number, as well as name and address information and an optional picture of the patron.

More information about the patron is contained on the bottom-half of the window under individual tabs. Click on the tabs to reveal more patron information.

The patron you are presently viewing is called the **Current Patron**. Selecting the **Circulation** window automatically reveals the **Current Patron**. Likewise, if you have a current patron displayed on the **Circulation** window and select the **Patrons** window, the same current patron is displayed.

Patrons	
First	⇧⌘[
Previous	⌘[
Next	⌘]
Last	⇧⌘]
Browse	⌘B
Find	⌘F
Unlock Record	⌘U
New Patron	⌘N
Duplicate	⌘D
Remove Patron	⌘R
Paste Patron Picture	⌘Y
Remove Patron Picture	
Show Details	⇧⌘D
Show History	

## Using the Patrons Menu

You can view, modify, add and remove patron information using the **Patrons** window and the commands in the **Patrons** menu. When the **Patrons** window is the foremost window, a **Patrons** menu becomes available in the menu bar.

The **First**, **Previous**, **Next** and **Last** commands display the indicated record (first, previous, next or last) based on the order of the records shown in the **Browse By** field.

The arrows to the left of the **Browse By** field perform the same action as the **Next** and **Previous** commands.

**First**—Displays the first record according to the **Browse By** order.

**Previous**—Displays the previous record according to the **Browse By** order.

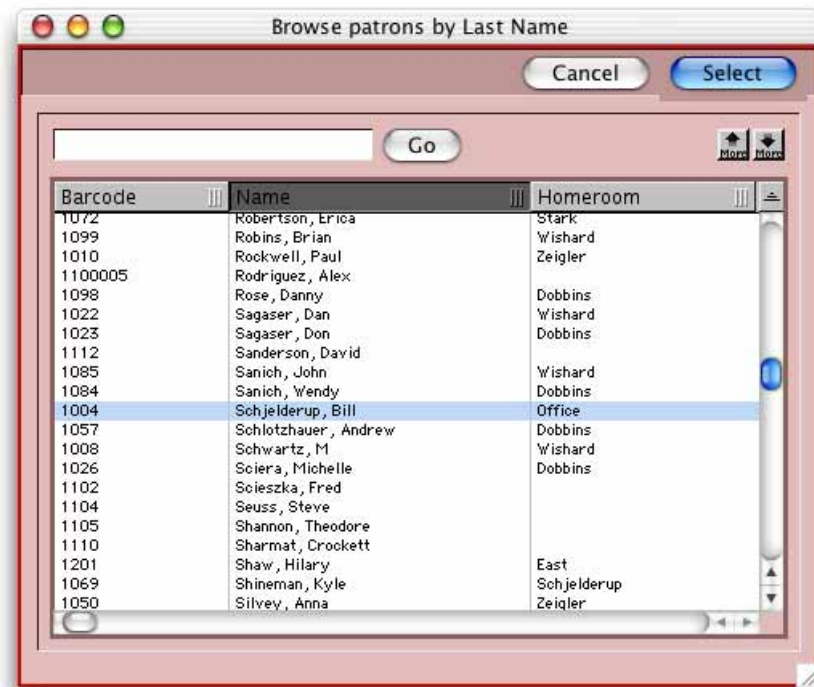
**Next**—Displays the next record according to the **Browse By** order.

**Last**—Displays the last record according to the **Browse By** order.

Patrons	
First	⇧⌘[
Previous	⌘[
Next	⌘]
Last	⇧⌘]
Browse	⌘B
Find	⌘F
Unlock Record	⌘U
New Patron	⌘N
Duplicate	⌘D
Remove Patron	⌘R
Paste Patron Picture	⌘Y
Remove Patron Picture	
Show Details	⇧⌘D
Show History	

## Browsing Patrons

Use the **Browse** command under the **Patrons** menu to view a quick list of patrons starting with the currently selected record.



Use the up and down arrow keys to move through the list. To display more patrons, click on the **More** buttons on the top right of the window or press the up or down arrow key to move upwards or downwards at the ends of the list. To position the *browser* at another patron, enter information in the empty field to the left of **Go** and then click on the **Go** button.

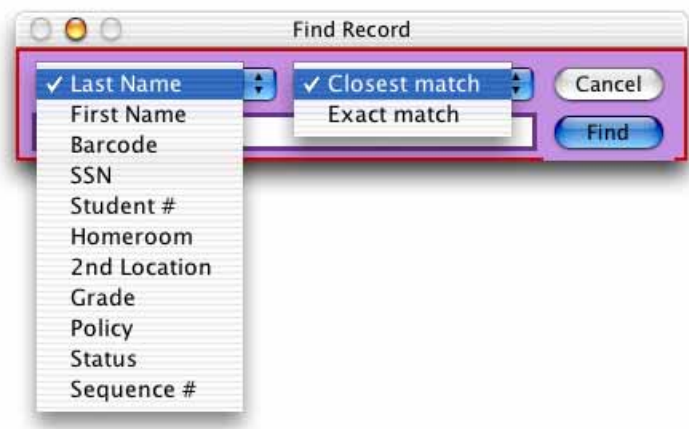
To select a patron in the list, either double click on the patron or click the patron once and click **Select** or press the <enter> | <return> key on your keyboard.

When you select a record from the **Browse** window, the selected record is activated and displayed. To leave the **Browse** window without changing the current record, select **Cancel**.

Patrons	
First	⇧⌘[
Previous	⌘[
Next	⌘]
Last	⇧⌘]
Browse	⌘B
Find	⌘F
Unlock Record	⌘U
New Patron	⌘N
Duplicate	⌘D
Remove Patron	⌘R
Paste Patron Picture	⌘Y
Remove Patron Picture	
Show Details	⇧⌘D
Show History	

## Finding Patrons

The **Find** command under the **Patrons** menu can be used to locate a specific patron. For example, if you are looking for a patron with the last name “Anderson,” Alexandria finds the first patron record with that name and selects it as the **Current Patron** in the **Patrons** window.



The first field menu allows you to select where to search for the data. The second field allows you to select **Closest Match** or **Exact Match**.

Click on **Find** to locate the record, or click **Cancel** to stop the **Find** operation and return to the most recent patron record. If a **Find** is performed, the **Browse by** selection is automatically set to the same selection as the **Find** key.

Patrons	
First	⇧⌘[
Previous	⌘[
Next	⌘]
Last	⇧⌘]
Browse	⌘B
Find	⌘F
Unlock Record	⌘U
New Patron	⌘N
Duplicate	⌘D
Remove Patron	⌘R
Paste Patron Picture	⌘Y
Remove Patron Picture	
Show Details	⇧⌘D
Show History	

## Modifying Patron Information

You can edit information directly in the **Patrons** window or in any of the tabs in the window. You can edit information in these windows the same as you would in other applications. For example, you can place the cursor in a field with existing value and type additional values or you can highlight a value in a field and type over it. Before records can be changed, they must be unlocked by using the **Unlock** command (see “Changing Records” on page 50).

### - N O T E -

If your preferences are set to lock records, you’ll have to unlock the record first by clicking on the lock icon or selecting **Unlock** from the **Preferences** menu before you can make changes to the record.

To move to the next data entry field, press the <tab> key. To move to the previous data entry field, press <shift-tab>. To select a data entry field to edit, click in the same field. To select from a drop-down menu, <tab> until the drop-down menu you desire is highlighted and use the <up> and <down> arrow keys to make your selection.

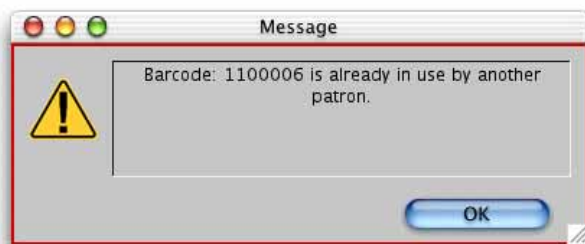
When you have modified all the information you want in the record, click the **Save** button in the upper-right of the window. The record is saved. If you want to ignore the information you have entered, click the **Revert** button to restore the previous record and discard your changes.

If you try to select another record or leave the window without saving your input, the following warning message appears.



Click the **Cancel** button to return to the window with your input still displayed. Click the **Discard** button if you want to ignore the data you entered. Click the **Save** button or the <enter> key to save your changes.

If you try to save a record with a barcode that is already in use (e.g., 1001), the following window appears. You will have to change the barcode to a unique barcode or discard all changes.



If you want to modify the information for a group of patrons, use the appropriate utility (see “Patron Utility Types” on page 478).

## Patrons

First	⇧⌘[
Previous	⌘[
Next	⌘]
Last	⇧⌘]
Browse	⌘B
Find	⌘F
Unlock Record	⌘U
New Patron	⌘N
Duplicate	⌘D
Remove Patron	⌘R
Paste Patron Picture	⌘Y
Remove Patron Picture	
Show Details	⇧⌘D
Show History	

## Adding New Patrons

Use the **New Patron** command to add a new patron to your database. When you select the **New Patron** command, the **Patrons** window will appear with fields where you need to add information.

Fill in all the data fields in the window (such as First, Last, Address, and so forth) to add a new record. Alexandria automatically copies the **City**, **State**, **Postal Code** and **Country** from your library address (see “*Local Library Information Preferences*” on page 131) for the new patron.

To move to the next data entry field, press the <tab> key. To move to the previous data entry field, press <shift-tab>. To select a data entry field to edit, click in the field. To select from a drop-down menu, <tab> until the drop-down menu you desire is highlighted and use the <up> and <down> arrow keys to make your selection.

The **Barcode**, **Last Name**, **Policy**, **Status**, **Expiration Date**, **Gender**, and **Password** fields are required to add a new patron. All fields except for **Password** and **Last Name** will be defaulted. Alexandria automatically displays a barcode number based on the value you entered in the **Next Barcode** field in the **Patron Management Preference** window (documented on page 137). You may type over this value to change it.

When you have added all the information you need for this patron, click the **Save** button in the upper-right corner of the window. If you want to ignore the information you have entered, click the **Revert** button. The previous patron is displayed.

You can add many patrons quickly if you have their data in electronic format (see “*Data Import and Export*” on page 495 for complete instructions).



Patrons	
First	⇧⌘[
Previous	⌘[
Next	⌘]
Last	⇧⌘]
Browse	⌘B
Find	⌘F
Unlock Record	⌘U
New Patron	⌘N
Duplicate	⌘D
Remove Patron	⌘R
Paste Patron Picture	⇧⌘Y
Remove Patron Picture	
Show Details	⇧⌘D
Show History	

## Duplicating a Patron

Use the **Duplicate** command to make a copy of an existing patron. You can then modify the information to create a new patron. This will save the data entry time when you add patrons who have similar information such as location, graduation date, policy and status.

When you select the **Duplicate** command, the **Patrons** window appears with copied information from the last selected patron. This window will have automatically selected the **Next Barcode** (see “Patron Management Preference” on page 137) for patrons rather than duplicating the barcode from the previous record. Type over any information on the window with the information specific to the new patron.

## Removing a Patron

At times you may need to remove a patron from your system. Removing patrons who no longer use your library helps ensure the accuracy of your reports.

### W A R N I N G !

Before you remove a patron, backup your data files. Removing patrons is permanent and cannot be undone! If you erroneously remove a patron, you will have to re-enter all their information or recover the information from a backup copy of your data.

Use the **Remove** command to permanently remove the current patron.

When a record is removed, all associated information is also removed. For example, removing a patron also removes any holds or reservations that the patron has pending. A patron with items checked out *cannot* be removed until all items have been returned to the library or recorded as **Lost**.

## Paste Patron Picture

If you have a picture on your operating system clipboard, this command will paste it into the patron picture field. For more information on adding, copying, or removing patron pictures, please see the patron picture section of page 182.

## Remove Patron Picture

Clears the current patron picture.

## Show Details

Shows details for the current patron. Displays the same report as the **Details** button on the **Circulation** window.

## Show History

Shows the history of patron transactions. When the **Keep Patron History** checkbox (see “Statistics” on page 186) is not checked, only payment and fine history are maintained and displayed.

## Special Patrons

When you start Alexandria, it creates several special patrons using barcodes 1 through 6. These patrons are used to track items with a special status such as **Lost**, **Archived**, **On Order** or **Out For Repair**. Barcodes numbered 1-20 are reserved for Alexandria usage. If you attempt to add barcodes in these ranges, they will automatically be reassigned by the system. You can not add, remove or modify records in this range.

Special patrons are generally not shown in browse lists, reports or other areas of the program. In order to view them, they must be selected via barcode number in either the **Circulation** window, or **Patron Find** window.

Barcode numbers 21-49 are reserved for the librarian's special usage, and (similar to barcodes 1-20) are not generally shown to the user unless specifically requested. However, the librarian *can* add, remove, or modify these records.

For example, when you send an item out to be repaired, you can check the item out to the **On Repair** (Barcode 4) system patron. This leaves the item inventoried but prohibits another from checking it out when it's not available. When the item is returned, you simply check it back into the library and it's available for circulation again.

If you accidentally assign some of your patrons with system barcodes, all you need to do is go back and change their barcodes to fit your specified barcode range.

The following is a summary list of special patrons Alexandria creates. You can also create your own special patrons for tracking particular items.

- **Lost Items** (Barcode 1) to identify items you cannot find in your collection.
- **Discarded Items** (Barcode 2) to identify items you no longer want used in your library.
- **For Library Use** (Barcode 3) to assign items for use within the library.
- **On Repair** (Barcode 4) to track items you have sent out of the library for repair.
- **On Order** (Barcode 5) to track items you have on order but have not yet been received or shelved.
- **Archived Items** (Barcode 6) to identify items kept in the library and generally not checked out.



Patrons	
First	⇧⌘[
Previous	⌘[
Next	⌘]
Last	⇧⌘]
Browse	⌘B
Find	⌘F
Unlock Record	⌘U
New Patron	⌘N
Duplicate	⌘D
Remove Patron	⌘R
Paste Patron Picture	⌘Y
Remove Patron Picture	
Show Details	⇧⌘D
Show History	

## Patron Information Fields

The following section describes all the data fields in the **Patrons** window for each and every tab. When a field has an obvious meaning or use (such as **City** or **Phone**), it will not be included in the explanation unless there are special notes about how it is used.

### Primary Patron Information

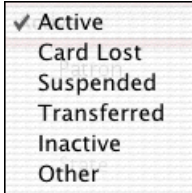
The top portion of the **Patrons** window contains information about the patron. This includes the patron barcode, policy, status and sex, as well as name and address information, and a picture of the patron.

These are fields that cross the top of the **Patrons** window:

**Patron Barcode**—Each patron will have a unique barcode number that is either assigned by the system or entered manually. This barcode can contain up to 15 digits and must be unique. It may contain numbers or letters, but no punctuation characters or spaces.

However, if you attempt to manually enter a patron barcode number that is less than *three* alphanumeric characters, Alexandria will display a warning message and disable the **Save** feature until the user has changed the barcode.

**Patron Policy**—The policy you assign to a patron determines the library rules that this patron must follow. To select a policy for a patron, click the arrow at the end of the **Policy** drop-down menu and choose a value. The default policy for new patrons is automatically assigned based upon the **Patron Management** preferences (see “Policy Preferences” on page 141 for more information).



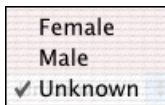
**Patron Status**—The second field from the right at the top of the **Patrons** window is the **Patron Status** field. A patron's status identifies active patrons and those with special circumstances such as a lost card, suspended or transferred.

To select a status for a patron, click on the arrows at the end of the patron status drop-down menu. The following values are available:

**Active**—A patron whose status is set to **Active** can use the library (check in and check out) according to the rules of the assigned patron policy.

**Lost Card** or **Suspended**—This status causes a message to display at the Librarian Workstation when the student ID/barcode is entered. The message recognizes a patron's status and asks the librarian to verify that it's okay to continue with this patron.

**Transferred, Inactive, Other**—These status options are for generating patron reports for patrons with a status other than active. For example, you could generate a list of all patrons that have transferred or are inactive. These statuses cause a message alert at the Librarian Workstation when the student ID/barcode is entered.



**Gender**—Click on the arrow at the end of this drop-down menu to select the patron's sex. The default is **Unknown** until the patron's sex is identified.

**First**—Enter the patron's first name or the first name and middle initial.

**Last**—Enter the patron's last name. This field is required, you *cannot* save a patron record without a last name.

**Address, City, State, Postal Code, Country**—Enter the patron's mailing address. Notices and letters are sent to this address.



**Patron Picture**—You can use GIFs, BMPs, PICS, JPGs (or most standard image files) as viable formats to add patron pictures to the patron record. The picture will appear in the box under the gender menu in the **Patron** window and in the **Current Patron** section of the **Circulation** window. There are several ways to add a picture to the **Patrons** window:

**Drag and drop**—Open the picture of the patron in the application where it was created. Drag the graphic from the desktop or program onto the **Patrons** window in Alexandria. As you drag the picture, a box outline shows where the picture is to be placed to help you align it properly.

**Paste and Copy Patron Picture**—Open the picture of the patron in the application where it was created. Select the graphic and copy it to your operating system clipboard (this is usually done with commands such as **Select All**, **Copy**, and **Cut** under the **Edit** menu in the program). Go back to your Alexandria **Patrons** window and choose **Paste Patron Picture** from the **Patrons** drop-down menu at the top of the window (or by right-clicking in the patron picture field). The picture appears in the area under the **Gender** button.

**Patron Utilities**—If you would like to import patron pictures en masse from a CD-ROM or other such storage device, please see "Patrons: Import Patron Pictures" starting on page 483.

**Sequence #**—A unique number assigned to the patron by Alexandria. This number is useful for browsing by order of entry.

Patrons	
First	⇧⌘[
Previous	⌘[
Next	⌘]
Last	⇧⌘]
Browse	⌘B
Find	⌘F
Unlock Record	⌘U
New Patron	⌘N
Duplicate	⌘D
Remove Patron	⌘R
Paste Patron Picture	⌘Y
Remove Patron Picture	
Show Details	⇧⌘D
Show History	

## Personal Info

Here is a brief description of the fields located on the **Personal Info** tab:

The screenshot shows the 'Personal Info' tab selected. The form has two columns of input fields. The left column includes SSN, Student #, School, Homeroom, 2nd Location, Password (masked with asterisks), and Email. The right column includes Graduation Date, Grade, Card Exp Date (pre-filled with 'Aug 8, 2003'), Birthdate, Parent/Guardian, Phone, and Fax. The form is set against a light red background.

**Community ID<sup>1</sup>**—(shown as **Student #** in the example above) Community ID is designed to be used for your local ID. This could be a student code, phone number, parcel number or any other unique identification code.

**Government ID**—(shown as **SSN** in the example above) In the United States, the government ID is typically the social security number (**SSN**); other countries may use other formats.

### - A Note About Community and Government ID -

These are alternate unique ID codes you may want to use with Alexandria. If you plan on updating patron information automatically from a central administration system (or you want to locate patrons by alternative codes, enter data in these fields). Duplicate values are not allowed; if a duplicate code is entered, Alexandria will give you an error message, notifying you that you need to make your code unique.

**Location<sup>2</sup>**—(shown as **Homeroom** in the example above) The location of a patron in a school is typically the student's homeroom or first period class. You can change the name of this field in the **Patron Management** preference window. To ensure the accuracy of reports, be *consistent* when entering information in this field. Reports can be generated and sorted by this field. For example, you may print an overdue list of all students in a homeroom with overdue items.

If numeric ranges are going to be used in this field, they need to be padded with zeros in order to be sorted and selected correctly. For example, instead of a "1", "2", "402", you'd insert "001", "027", "402". Basically, all entries within a numeric range *need* to have the *same number* of characters.

1. This term can be customized by the librarian (see "Patron Management Preference" on page 137 for instructions).

**Sublocation**<sup>1</sup>—(shown as **2nd Location** in the example above) Use this field to group patrons by a second location or to track any other useful data. You can enter letters, numbers, as well as spaces in this field.

Reports can be generated and sorted by this field. Therefore, to ensure the accuracy of reports, be *consistent* when entering information in this field. You could, for example, use this field to classify the ethnicity of patrons for government or internal reports.

**Password**—An optional password can be entered for the patron. For security reasons, passwords are shown as “\*” characters and are used by the patron to identify themselves when performing remote transactions. The password will default to the patron’s **Last Name** without spaces or punctuation.

**Email**—Enter the email address for the patron if you plan to use email for notification purposes such as overdue notices. If you choose email as the type of report when printing overdue notices, the notice is sent to the specified email addresses. If you don’t enter a valid address or leave the field blank, email messages will not be sent to patrons. To guarantee that your email notifications are being sent, please check the list of requirements located under **Enable Email Notifications** on page 111.

**Graduation Date**—Enter the date the patron will graduate. This field is used to compute the patron’s current grade. Patrons automatically graduate to the next grade level on the date you enter as the last day of school on the **Library Information** preference window. Graduated patrons are given the grade level of “graduated.”

**Level**<sup>2</sup>—(shown as **Grade** in the previous example) This field identifies the patron’s level in school. If the school library and graduation date have been entered, Alexandria will assign the level based on your preferences. If you enter a level and a school library, Alexandria will calculate the graduation date for you. Alexandria will advance patrons one level after the last day of school if the level is set to either “JK” (junior/kindergarten), “PS” (pre-school), “K” (kindergarten), or “1-12”.

**Card Exp. Date**—Enter the date the patron’s library card expires. If you leave this field blank, Alexandria will calculate the expiration date based on the patron’s policy when the patron record is first added to the system. For example, if a **Patron Policy** in **Preferences** is set for 365 days, the card will expire 365 days from the date the patron was entered.

**Birthdate**—Enter the patron’s birth date. This information is used solely for reference.

**Parent/Guardian**—Enter the patron’s parent or guardian. This information is used solely for reference.

**Phone** and **Fax**—Enter the phone number and fax number that should be used to notify the patron of special events, overdue items, in-stock holds, and other official library business.

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1. Authority Control is available for Location and 2nd Location by pressing <option-tab> on Macintosh or <ctrl-tab> on Windows.

2. This term can be customized by the librarian (see “Patron Management Preference” on page 137 for instructions).

Patrons	
First	⇧⌘[
Previous	⌘[
Next	⌘]
Last	⇧⌘]
Browse	⌘B
Find	⌘F
Unlock Record	⌘U
New Patron	⌘N
Duplicate	⌘D
Remove Patron	⌘R
Paste Patron Picture	⌘Y
Remove Patron Picture	
Show Details	⇧⌘D
Show History	

## Notes

The **Notes** tab includes information about the patron's emergency contacts as well as groups the patron belongs to and general notes about the patron.



### NOTE:

If any notes exist for a patron, a plus sign ( + ) appears next to the patron's name on the **Circulation** window. You can enter a plus sign <+> on the command line in the **Circulation** window to display the note when the patron is the **Current Patron**.

**Contact Notes**—Identifies the parent or guardian you need to contact in case of emergency. Enter the contact name, address and phone number if it is different from the patron's address and phone number. You may enter more than one name and address.

**Categories**—Enter information about groups the patron belongs to. Such as, special reading programs, at-risk students, special education students, gifted students, library contest students, or any other groups that you find useful. The categories can be used to select patron records for reports.

**Alert Note**—This field is used to make the librarian aware of special circumstances regarding a patron. For example, you can enter an alert message to pass on to the patron next time the patron is in the library. The alert message automatically appears on the **Circulation** window when you enter the patron's barcode number.

**General Notes**—This field is used for additional comments about a patron. These comments can be viewed only from the Librarian Workstation. When any notes exist for a patron, a **Notes** button appears under the patron's picture on the **Circulation** window when he/she is the **Current Patron**. Click the **Notes** button to view the notes entered for this patron.

Patrons

- First ⌘[
- Previous ⌘[
- Next ⌘]
- Last ⌘]
- Browse ⌘B
- Find ⌘F
- Unlock Record ⌘U
- New Patron ⌘N
- Duplicate ⌘D
- Remove Patron ⌘R
- Paste Patron Picture ⌘Y
- Remove Patron Picture
- Show Details ⌘D
- Show History

Statistics

The **Statistics** tab includes statistics about the patron’s use of the library. Alexandria automatically generates this information and you cannot modify it.

Personal Info

Notes

Statistics

Attachments

☐ Keep Patron History

Patron, Sample (1100005)8

Items Out.....0	Lifetime Usage.....0
Items Overdue.....0	Lifetime Overdues.....0
Pending Holds.....0	Reservations.....0
In-Stock Holds.....0	Reserves.....0
Fines.....\$0.00	Last Use.....Aug 8, 2002
Payments.....\$0.00	Last Validation.....Aug 9, 2002
Balance Due.....\$0.00	Next Validation Due.....Aug 9, 2002
	Accession Date.....Aug 8, 2002

Current/Previous Policy : STD/STD

Usage

No usage statistics recorded for this patron.

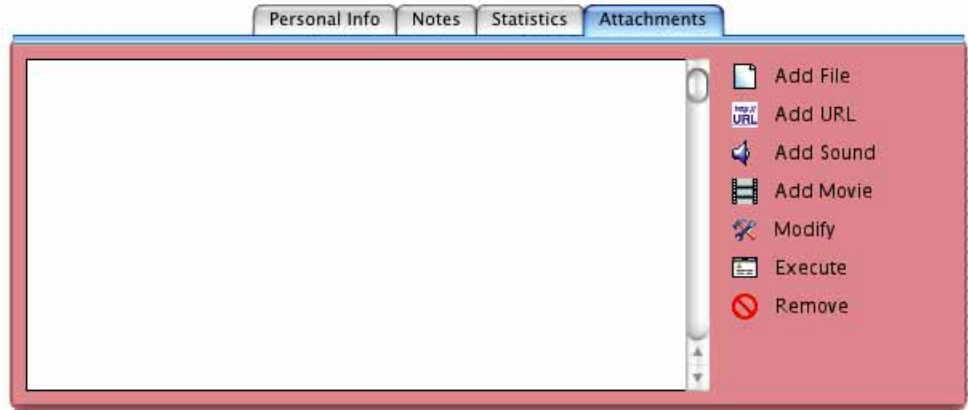
**Keep Patron History**—When this box is checked, Alexandria keeps a history of this patron’s transactions. You can view the transaction history data by using the **Show History** selection on the **Patrons** menu or the button that appears when this option is checked (activated).



Patrons	
First	⇧⌘[
Previous	⌘[
Next	⌘]
Last	⇧⌘]
Browse	⌘B
Find	⌘F
Unlock Record	⌘U
New Patron	⌘N
Duplicate	⌘D
Remove Patron	⌘R
Paste Patron Picture	⌘Y
Remove Patron Picture	
Show Details	⇧⌘D
Show History	

## Attachments

You can associate web pages, multimedia, and other documents to a patron using the **Attachments** tab. To add attachments, use the icons on the right of the window, or drag and drop documents into the attachment list. To edit an attachment, double click on its name in the list. To view the attachment, <option>-double click on its name in the list.



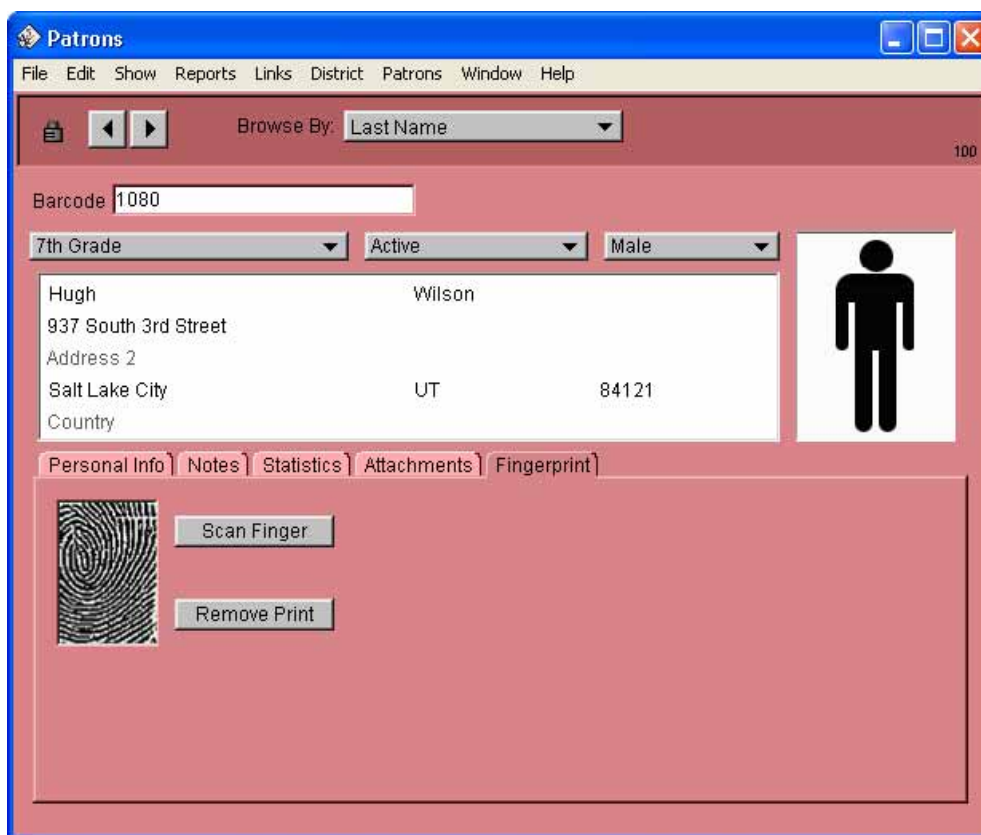
Attachments are shown in the **Patron Details** window.



## Fingerprint

Users often rely on memorized combinations of letters and numbers to protect their valuable information and data. Unfortunately, in the computer world, memorized passwords provide unreliable protection, as they are often intercepted or leaked to less scrupulous characters and then to the general public.

Alexandria provides an exceptional authentication tool that can be used at your location in lieu of cumbersome library cards that are often lost or forgotten by patrons. Would-be attackers won't be able to fool the system by guessing user-passwords or intercepting and misusing them for illicit purposes.



Using biometric identification hardware, you can do away with remembering secret passwords or worrying about mischievous patrons misusing user passwords. Fingerprints can not be duplicated, therefore, patron identification can not be faked or fooled.

**Scan Finger**—Brings up the scan **Fingerprint Scan** window.

**Remove Print**—Removes the patron fingerprint from the **Patron Management** window.



# Item Management

This chapter explains how to manage information for the items in your library.

## - N O T E -

If you are using a multi-collection license for Alexandria, all libraries share title information, thus, all other libraries can view the changes you make.

The Alexandria Librarian workstation allows you to view and edit titles from every collection in your district, but only *your* title statistics and copy information may be modified from your workstation.

The District Librarian Workstation allows viewing and editing of all database information across all collections.

## About MARC records

All Alexandria item data is saved in MARC<sup>1</sup> (**M**Achine-**R**eadable **C**ataloging) record format, the standard for bibliographic data around the world. If you don't know MARC standards, Alexandria has an easy entry editor that lets you view and edit MARC data without any technical MARC knowledge.

For those who are familiar with MARC standards, a powerful MARC Editor is available for viewing and editing your data. You can switch between the two editors using a menu selection or keystroke.

Although it's hidden from you, Alexandria saves additional information in the MARC record for performing its library automation duties. This information is Alexandria-specific and is *not* included in the MARC editor. However, if you export data to transfer into another Alexandria system, the export functions will include this Alexandria-specific information.

The MARC standard is complex and ever-changing. Thus, there may be information in your MARC records that is valid MARC data, but unused by Alexandria. It may be that new versions of Alexandria will use this data, so it's carefully saved with the rest of the MARC data. If you have MARC information that you'd like Alexandria to process, send a written request to:

Alexandria MARC Suggestion  
COMPAnion Corporation  
1831 Fort Union Blvd.  
SLC, UT 84121

Or, send an email to: "v5Comments@companioncorp.com"  
Your request will be examined and you'll receive a response.

1. To learn more about MARC tags and subfields, visit the Library of Congress' website at "<http://www.loc.gov/MARC/>"

Show	
Bulletin Board	
Patrons	Ctrl+L
Items	Ctrl+I
Circulation	Ctrl+T
Search	Ctrl+K
Dictionary	
Orders	
Budgets	
Vendors	
Subscriptions	
Routes	

## Item Management Window

The **Items** window displays information about items in your library. All items that circulate (books, magazines, audio video media) are accessible through the **Items** window.

The term “item” can also mean “title”, “issue”, or “copy” depending on the context. An item can be a book, video, filmstrip, newspaper, or any other form of media in your collection. Each title can have multiple copies. **Title Information** consists of data that is identical for all copies of a particular title, including author, publication, and notes. **Copy Information** consists of data that is specific to a given copy.

Under the **Show** menu, select **Items**.

The top portion of the window contains primary information about the current item. This includes the call number, title policy, medium, title, author, and other publishing information. Item information is maintained on the bottom half of the window on separate tabs. Click on the corresponding tabs to show item information.

## Items

Switch to MARC View	Ctrl+M
First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Browse	Ctrl+B
Find	Ctrl+F
Unlock Record	Ctrl+U
New Title	Ctrl+N
Remove Title	Ctrl+R
Modify Copy	
Add Copy	Ctrl+Y
Remove Copy	
Move Copy To This Title	
Duplicate	Ctrl+D
Paste Item Picture	
Remove Item Picture	
Show Details	Ctrl+Shift+D
Show Title Editor	Ctrl+Shift+T
Show Author Editor	Ctrl+Shift+A

## Edit

Can't Undo	Ctrl+Z
Can't Redo	Ctrl+Shift+Z
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Clear	
Select All	Ctrl+A
Speak Text	
Find	Ctrl+F
Find Again	Ctrl+G
Paste From File	
Preferences	Ctrl+;

## Using the Items Menu

You can view, modify, add and remove item information using the commands located under the **Items** menu. When the **Items** window has focus, an **Items** menu is available in the menu bar.

The **First**, **Previous**, **Next** and **Last** will shuffle through records based on the order of the records selected from the **Browse By** drop-down menu (first, previous, next, or last).

The arrows to the left of the **Browse By** field perform the same function as the **Next** and **Previous** commands.

**First**—Displays the first record according to the **Browse By** order.

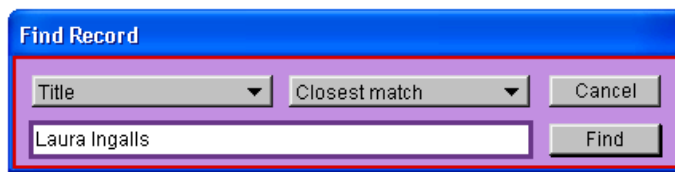
**Previous**—Displays the previous record according to the **Browse By** order.

**Next**—Displays the next record according to the **Browse By** order.

**Last**—Displays the last record according to the **Browse By** order.

## Finding Records

The **Find** command under the **Edit** menu can be used to locate specific data. For example, if you are searching for an item titled “Biographical,” Alexandria finds the first item record that most closely matches that title and selects it as the Current Item, shown in the **Items** window.



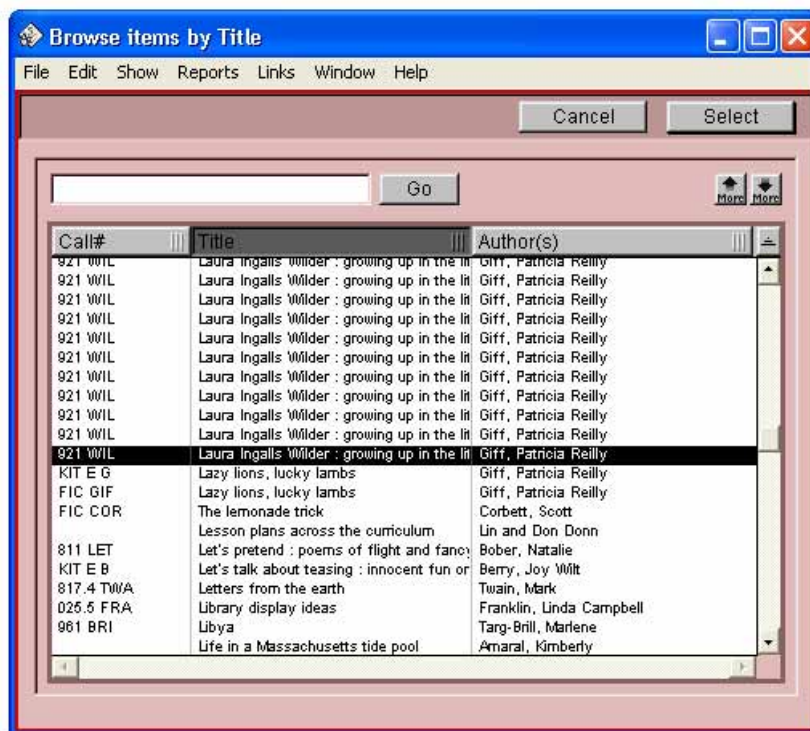
The first drop-down menu allows you to specify the type of data you are searching for. The second drop-down menu allows you to select **Closest match** or **Exact match**.

Click the **Find** button to locate the record, or click the **Cancel** button to stop. The **Find** window is automatically set to the same selection as the **Browse by** window. If a **Find** is performed, the **Browse By** selection is automatically set to whatever options you entered into the **Find Record** field.

The **Browse By** commands (**First**, **Previous**, **Next**, and **Last**) and the **Find** command change depending on the information being viewed. With titles, browsing and finding options appear in the drop-down menu when the **Title Information** tab is active. Copy-specific options are available when the **Copy Information** tab is active. With copies, browsing and finding is limited to the **Title** displayed in the primary information portion of the **Items** window. When the **Copy Information** tab is active, you can use the **Browse** command to move between titles.

## Browsing Records

Use the **Browse** command from the **Items** menu to view a list of items starting with the currently selected item record.



Use the up and down arrow keys on your keyboard to move the selection bar through the list. To display a new page of items, click on the **More** buttons on the top right of the window or use the up and down arrow key at the ends of the list. To position the browser at another item, enter text that approximates the item or copy you would like to view in the empty field to the left of **Go** button and then click **Go**.

To select an item from the list, either double-click on the item or highlight (select) the item and click **Select** (or press <enter> | <return> on your keyboard).

When you from record from the **Browse** window, the selected record is displayed. To leave the **Browse** window without changing the current record, use the operating specific close box or click the **Cancel** button.

The records displayed in the **Browse** window are sorted by the value selected from the **Browse By** drop-down menu at the top of the **Item** window. To change the order in which the records are displayed, choose a different value from the **Browse By** drop-down menu.

## Items

Switch to MARC View	Ctrl+M
First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Browse	Ctrl+B
Find	Ctrl+F
Unlock Record	Ctrl+U
New Title	Ctrl+N
Remove Title	Ctrl+R
Modify Copy	
Add Copy	Ctrl+Y
Remove Copy	
Move Copy To This Title	
Duplicate	Ctrl+D
Paste Item Picture	
Remove Item Picture	
Show Details	Ctrl+Shift+D
Show Title Editor	Ctrl+Shift+T
Show Author Editor	Ctrl+Shift+A

## Changing Item Information

You can edit information directly on the **Items** window or in any of the tabs within the window. For example, you can place the cursor in an existing value and type additional information. You can also highlight the entire value and type over it. Before records can be changed, they must be unlocked using the **Unlock** command (see “Changing Records” on page 50).

### - N O T E -

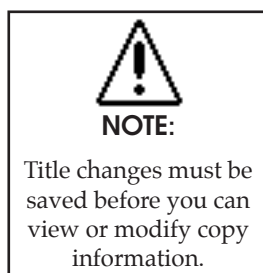
If your preferences are set to automatically lock records, you'll have to unlock the record by manually clicking on the lock icon from the upper left-hand side of the window or selecting **Unlock** from the **Items** menu before you can make changes to the record.

To move to the next data entry field, press the <tab> key. To move to the previous data entry field, press <shift-tab>. To select a data entry field to edit, click in the same data field. To select from a drop-down menu, <tab> until the drop-down menu you desire is highlighted and use the <up> and <down> arrow keys to make your selection.

To modify copy information, click on the **Copy Information** tab and **Browse** or **Find** the copy to modify. When you have modified the copy information you want to change, click **Save**.

When you have modified all the record information you want, click the **Save** button in the upper right of the window. The record is now saved. If you want to ignore the information you have entered, click **Revert** to discard your changes.

If you try to select another record or leave the window without saving your input<sup>1</sup>, the following warning message appears.



Click the **Cancel** button to return to the window with your changes still intact. Click the **Discard** button if you want to ignore the data you've entered. Click the **Save** button or <enter> to save your changes.

1. You can set a preference to automatically save changes (see “Automatically Save” on page 118 for more information).

## Items

Switch to MARC View	Ctrl+M
First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Browse	Ctrl+B
Find	Ctrl+F
Unlock Record	Ctrl+U
New Title	Ctrl+N
Remove Title	Ctrl+R
Modify Copy	
Add Copy	Ctrl+Y
Remove Copy	
Move Copy To This Title	
Duplicate	Ctrl+D
Paste Item Picture	
Remove Item Picture	
Show Details	Ctrl+Shift+D
Show Title Editor	Ctrl+Shift+T
Show Author Editor	Ctrl+Shift+A

## Adding New Titles or Copies

Use the **New Title** command to add a new title to your database. When you select the **New Title** command, the **Items** window appears with blank fields for you to add information.

Type over the prompts in the window (such as call number, title, and so forth) to add a new record.

To move to the next data field, press the <tab> key. To move to the previous data entry field, press <shift-tab>. To select which data entry field to edit, click on the field. To select from a drop-down menu, <tab> until the drop-down menu you desire is highlighted and use the <up> and <down> arrow keys to make your selection.

**Title**, **Ignore Leading Characters**, **Medium**, and **Policy** are all required in order to add a new item. Of these fields, all but **Title** are defaulted. Items may be added with or without copies.

Use the **Add Copy** command to add new copies to this title. Remember, copies are part of the title record and cannot be added until the title is saved.

When you have added all the necessary information for this title, click the **Save** button in the upper right of the window. Add any additional copies you desire and then click the **Save** button. If you want to discard the information you have entered, click the **Revert** button.

## Removing a Title or Copy

Items that have been discarded, given to other libraries, sold, or permanently lost must be removed from the system to keep reports and searches from becoming cluttered with obsolete information. However, be certain that the items you are removing from the system have been permanently expunged from your collection.

For example, a lost item may eventually be found or returned. In this case, it is better to record those items as **Lost**, **Discarded**, **On Repair**, **On Order**, **Archived** or **Unknown**. These special item categories allow you to keep track of items that may eventually return to your library (see “*Special Patrons*” on page 257). Only remove those items that will *never* return to your collection.

Use the **Remove Title** command to permanently remove the current title and all its copies.

**Remove Copy** is only available when there are copies listed in the **Copy Information** field. Selecting this option will remove the current active copy whether it is lost or available.

When a title is removed, all associated information is also removed. A title that has a copy checked out to a patron can *not* be removed. However, copies that are checked out to the **Lost**, **Discarded**, **On Repair**, **On Order**, **Archived** or **Unknown** patrons can be removed. The **Remove Copy** command only removes the selected copy record.

### WARNING !

Removing items is permanent and *cannot* be undone. If you remove an item in error, you will have to re-enter the information or recover it from a backup copy of your data. If you need to report on items that are lost or discarded for the year, you should check those items out to the corresponding “special patron”. Run all necessary reports (such as **Super Summary** or **Special Item** lists) before removing these items. Once they are removed, they are unavailable for any other reports.



## Items

Switch to MARC View	Ctrl+M
First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Browse	Ctrl+B
Find	Ctrl+F
Unlock Record	Ctrl+U
New Title	Ctrl+N
Remove Title	Ctrl+R
Modify Copy	
Add Copy	Ctrl+Y
Remove Copy	
Move Copy To This Title	
Duplicate	Ctrl+D
Paste Item Picture	
Remove Item Picture	
Show Details	Ctrl+Shift+D
Show Title Editor	Ctrl+Shift+T
Show Author Editor	Ctrl+Shift+A

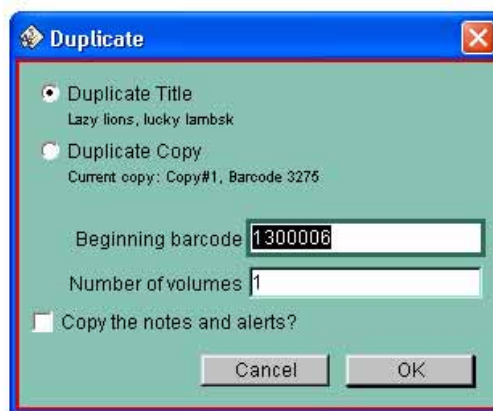
## Move Copy to this Title

Use this feature when a copy is mistakenly imported (or added) to the wrong title. Enter the barcode of the copy you wish to move under the Current Item and click **More**. If the copy being moved is the last copy of the previous title and you would like that title to be removed automatically after the move has been completed, leave the **Remove source titles with no copies** box checked.

## Duplicating an Item

Use the **Duplicate** command to make copies of existing titles. You can then modify this information for the newly created item. This saves precious data entry time when you are adding items that have similar information (such as author, publisher and series).

**Duplicate** command, the **Duplicate Item** window appears.



Select whether you want to add a **Duplicate Title** or **Duplicate Copy**.

Alexandria automatically displays a **Beginning barcode** number based on the value you entered in the **Next Barcode** field of the **Item Management** preference window (see *"Item Management Preferences"* on page 121). Choosing **Duplicate Copy** changes the **Number of volumes** field to as **Number of copies**. Enter the number of additional copies you need for this title. You can type over this value to change it.

Type over the value in the **Number of volumes** field if the title you are duplicating has more than one volume. Each new title will be assigned a new volume number that will display on the screen. Type over the values that differ to create your new title.

After you enter the number of items you would like duplicated, click **OK**. A progress window appears to show the record is being duplicated.

If you chose to duplicate the title, the **Items** window appears with your new duplicate title. Type over values in this window to modify your new title.

If you chose to duplicate a copy, the **Items** window appears with your new duplicate copy added. Double-click on a new item copy in the copies field (below the **Author** field) if there are values you need to modify.

Be sure you modify all the fields with the correct information for your new item. If you forget to modify a particular field, it will retain the same information as the item that was duplicated.

## Show Details

The **Show Details** selection in the **Items** menu brings up the same window as the **Details** button on the **Circulation** window.

## Item Information Fields

The **Items** window contains three major sections: the **Primary Item Information**, the **Copy Information**, and additional tabs of related information.

### - N O T E -

Alexandria updates MARC records with the information you enter on the **Items** window.

**Primary Item Information**—The top portion of the window shows primary item information such as call number, policy, medium, title, and author. This portion of the **Items** window is visible regardless of the tab you have selected on at the bottom of the window

**Copy Information**—The middle portion of the window shows information about each copy of the title.

**Tabs**—Below this are tabs that you click on to display more information about this item.

The following sections describe fields contained within the **Primary Item Information** area of the **Items** window. When a field has an obvious meaning (such as city or phone) it is not documented unless there are special notes about how it is used.



## Primary Item Information

The top portion of the **Items** window contains primary information about the item. This includes the call number, policy and medium type, as well as title, author, volume, edition, LCCN and ISBN.

Copy#	Barcode	Call#	Status	Location	Library
1	1300006		Available		CDL

The fields in the top portion of the **Items** window are as follows.

**Title Call Number**—Each title is assigned a call number. The call number designates the location of an item in the library. Because call numbers are site-specific rather than universal (such as LCCN and ISBN), you must enter call numbers specific to your library. The title call number is saved in MARC field **900\_a**.

Depending on their source, imported MARC records may or may not include a call number for your item. Alexandria formats call numbers to remove control characters and double spaces, thus correcting incorrectly formatted numbers.

Copies “inherit” title call numbers unless a specific copy call number is changed.

**Item Policy**—The policy determines the circulation rules for a particular group of items. Every title is given a policy. In addition to specifying circulation rules, the item policy is used to group items for statistical analyses and reporting purposes.

Copies “inherit” a title policy unless a specific policy is assigned.

**Medium**—The medium identifies the type of “media type” or physical format of the item. The drop-down menu lets you choose from existing mediums that have been used so far in your library. The default is **Book**. The medium is saved in MARC field **245\_h**. You can create a new medium by selecting **Add NEW medium** in the drop-down **Medium** menu.



A screenshot of a web application's dropdown menu titled "Add NEW medium". The menu is open, showing a list of media types. The first item, "book", is selected and has a checkmark to its left. The other items in the list are "cdrom", "computer file", "filmstrip", "kit", "magazine", "music cd", "picture", "realia", "sound recording", "url", and "videorecording".

Add NEW medium	
✓	book
	cdrom
	computer file
	filmstrip
	kit
	magazine
	music cd
	picture
	realia
	sound recording
	url
	videorecording

**Volume**—The **Volume** field distinguishes multiple-volume works such as encyclopedias, certain periodicals, and books. Only volume designators are valid in this field (the word **Volume** automatically appears when volume is referenced on an Alexandria window).

If the item isn't part of a multiple-volume work, leave the field blank. The volume is saved at MARC tag **092\_v** or **440\_v**.

**Edition**—Enter edition information as you want it to appear in reports. For example, “2nd Ed.” or “2nd rev. Ed.” Edition information is saved in MARC field **250\_a**.

**LCCN**—Enter the item's Library of Congress Control Number. The LCCN is a unique 8-digit identifier assigned to an item's bibliographic record. You may enter the LCCN with or without punctuation, however, only numeric digits are saved. LCCN is saved in MARC field **010\_a**.

**ISBN**—Enter the item's International Standard Book Number. The ISBN is a unique identifier. A title may have more than one ISBN (e.g., the ISBN for the hardback edition differs from the paperback edition). Alexandria only displays the first ISBN found in the MARC record. Saved in MARC field **020\_a**.

You can enter an ISSN rather than an ISBN. If the number you enter is 8 digits, Alexandria assumes the number is an ISSN and saves it at MARC tag **022\_a**. If it has 10 digits, Alexandria assumes it is an ISBN.

**- N O T E -**

If you enter an invalid ISBN number, a question mark (?) appears at the beginning of the number to indicate it is not a valid ISBN number. Any punctuation, dashes, or spaces are not valid and will be removed by Alexandria.

## Items

Switch to MARC View	Ctrl+M
First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Browse	Ctrl+B
Find	Ctrl+F
Unlock Record	Ctrl+U
New Title	Ctrl+N
Remove Title	Ctrl+R
Modify Copy	
Add Copy	Ctrl+Y
Remove Copy	
Move Copy To This Title	
Duplicate	Ctrl+D
Paste Item Picture	
Remove Item Picture	
Show Details	Ctrl+Shift+D
Show Title Editor	Ctrl+Shift+T
Show Author Editor	Ctrl+Shift+A

## Adding Audiovisual Equipment

Your library might prefer to circulate audiovisual Carts that include specific items as one *group* and one barcode. Then again, you might require patrons to check out individual items (e.g. VCR's and Televisions) separately. Regardless of how your library functions, there are several ways you can add or check out audiovisual equipment using Alexandria<sup>1</sup>.

To add audiovisual equipment to your database, go to **Show, Items**, then **Items, New Title**. It is recommended that you enter default **Call Numbers** (e.g. AV, AVS, EQ, EQU) to distinguish these items from your books on various reports. You must also enter a default **Policy** (Audiovisual), **Medium**, and **Title**.

The screenshot shows the 'Items' window with the 'New Title' form. The 'Browse By' dropdown is set to 'Title'. The 'Standard Item' dropdown is set to 'Standard Item'. The 'audio visual' dropdown is selected. The 'Volume' field is empty. The 'Edition' field is empty. The 'LCCN' field is empty. The 'ISBN' field is empty. The 'Author' field is empty. The '# of Non-Filing Characters' dropdown is set to '0'. The 'Copy#', 'Barcode', 'Call#', 'Status', 'Location', and 'Library' fields are empty. The 'Content Notes' field contains: 'Sony 26" Color, High-Definition, Television', 'Hitachi 4-Head, S-Video, VCR', and '2 Remotes'. The 'General Note' field contains: 'TV includes Closed Captioning' and 'VCR has Commerical Advance'.

If you are creating an AV Cart (or group), then you can detail what's included with the AVCart in the **Content Notes** field and specify any distinctive functionality of the equipment in the **General Note** window. When you print this AVCart's barcode, you may want to print several to place on each item contained within.

If you have several AV Carts with similar equipment, you can **Add Copies** just as you would with books. However, be sure to detail any differences in the item's **Copy Notes**. For example, you might have five AV Carts with exactly the same television and two more with completely different brands/makes/models. Make sure to list any relevant **Alert Notes** for items that a patron/teacher might forget (e.g. return the remote controls).

If you are adding all AV equipment as separate components, you need to create a **New Title** for every television, VCR, slide projector, or compact disc player you have in your inventory so that they each have their own unique barcode. Even if you are using the AV Cart method, it is still a good idea to barcode each component individually for inventory purposes.

1. Remember to be consistent in how you circulate audiovisual equipment using Alexandria. There is no *one* set way to do this, it's essentially up to you.

## Title and Author Editor

Alexandria includes a **Title** and **Author Editor** under the **Items** window. This feature allows MARC savvy librarians to easily select what tags and subfields they would like to use to enter information (without having to use an actual MARC editor). The subsequent sections first explain how to enter MARC record information in the **Title** and **Author** fields, and is then followed with a description on how to use the **Title** and **Author Editor**.

**Title**—A title is required; the record will not be saved unless a value is entered in the **Title** field. The title is saved under MARC field **245\_a**.

In the **Title** field, if you enter a title that is longer than the line, the text wraps to the next line. To enter a subtitle, press <return> on the keyboard and enter a colon (":") followed by the subtitle. When you save the record, it is displayed with the colon and subtitle on the second line. This is saved under MARC field **245\_b**. You can also use the equals sign ("=") in the **245\_b** tag to designate a subtitle. However, the ("=") is mainly for multilingual titles.

For example:

Laura Ingalls Wilder  
: growing up in the little house

If you want to continue manually entering or editing MARC information from the **Title** field, you can enter statements of responsibility and general material designation. Begin a statement of responsibility (**245\_c**) with a front slash ("/") and enclose the medium in brackets ("["]"). All subfield information must begin on a new line in the **Title** field.

If you enter a medium, it will be saved (but not shown in the title field), only in the drop-down menu.

If you enter a statement of responsibility, and preferences are set to not show this, it will be saved, but not displayed.

If you enter title information and then <option-tab> (Macintosh) or <ctrl-tab> (Windows) out of the **Title** field (or if you have **Enable Authority Control** checked in the **Miscellaneous, Display Settings** preference window), an **Authority Control Title Search** window will appear, allowing you to see if this title is already in your collection. If it is, the **Authority Control** window will not display.

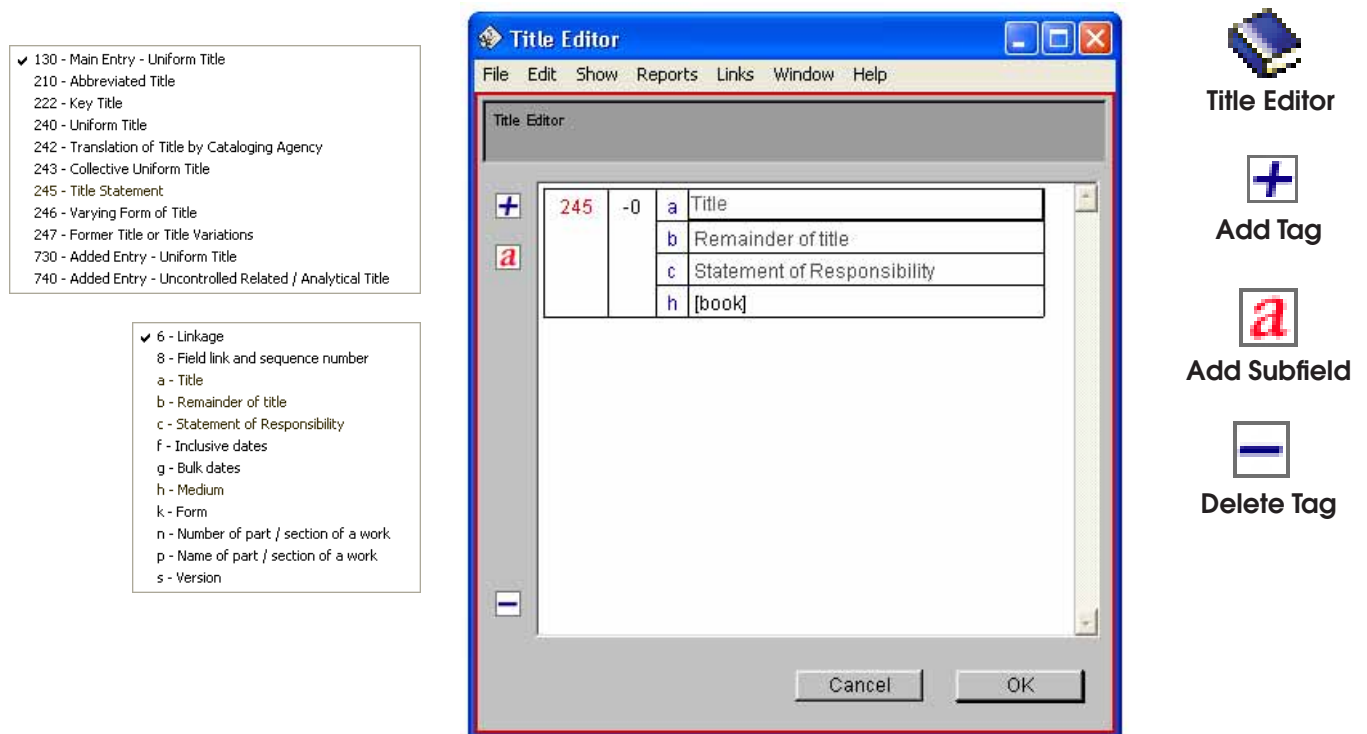
Underneath the **Title** field is the **# of Non-Filing Characters** drop-down menu with the digits 0-9. Use this drop down menu to specify the number of characters in the title to ignore when indexing the title. Thus, the title *The Wizard of Oz* should have a "4" selected so the book is sorted (indexed) as "Wizard of Oz". The final character to ignore must be either a space or punctuation character. If this indicator is set incorrectly, Alexandria will revert the **# of Non-Filing Characters** setting to zero rather than ignore a partial word.

**Author**—Enter "Last name, First name" in the author field. This is the primary author saved in MARC tag **100\_a**. To add/edit additional authors, use the **Author** or **MARC Editor** and add them as repeating **700\_a** or other appropriate tags.

If you <option-tab> (Macintosh) or <ctrl-tab> (Windows) out of this field (or have **Authority Control** check in the **Miscellaneous, Display Settings** preference window), an **Authority Control Author Search** window will appear, allowing you to see if this author is already in your collection. If they are, the **Authority Control** search window will not appear.

## Title Editor

If you want a quicker, easier method of editing Title MARC fields, click the **Title Editor** icon to the left of the **Title** field. The following window will appear:



Using the **tag** terminology learned from the previous page, enter or edit your MARC record information. The **Title Editor** allows you to easily enter multiple detailed subfields and add new **tags** to any item title. This method of entering information is far superior to that of the **Title** field. Click on the icons to the left of the **tag** field to **Delete** or **Add Tag** and **Subfield**.

The order you have for **Subfields** within a tag is saved as displayed. Tags will be saved in numerical order.

Any empty subfield will be removed when saved.

## Author Editor

When you have more than one author (or person responsible for publication), click on the **Show Author Editor** option under the **Items** menu or click the **Author Editor** icon. Use this editor to add, modify or remove authors. Please note, the first author is stored at MARC tag **100**, additional authors are usually stored in MARC tag **700**.

When you click on the **Author Editor**, the following window will appear:

- ✓ 3 - Materials specified
- 4 - Relator code
- 5 - Institution to which field applies
- 6 - Linkage
- 8 - Field link and sequence number
- a - Personal Name
- b - Numeration
- c - Titles and other words associated with a name
- d - Dates associated with a name
- e - Relator term
- f - Date of a work
- g - Miscellaneous information
- h - Medium
- j - Attribution qualifier
- k - Form subheading
- l - Language of a work
- m - Medium of performance for music
- n - Number of part / section of a work
- o - Arranged statement for music
- p - Name of part / section of a work
- q - Fuller form of name
- r - Key for music
- s - Version
- t - Title of a work
- u - Affiliation
- x - International Standard Serial Number

- 100 - Main Entry - Personal Name
- 110 - Main Entry - Corporate Name
- 111 - Main Entry - Meeting Name
- ✓ 700 - Added Entry - Personal Name
- 710 - Added Entry - Corporate Name
- 711 - Added Entry - Meeting Name

Tag	Subfield	Value
100	a	Personal Name
	q	Fuller form of name
	c	Titles and other words associated with
	d	Dates associated with a name



Author Editor



Add Tag



Add Subfield



Delete Tag



Quick Add

The **Author Editor** allows you to easily enter multiple detailed subfields and add new **tags** to any item title. Click on the icons to the left of the **tag** field to **Delete** or **Add Tag** and **Subfield**. Librarians unfamiliar with MARC editing can also use the simple **Quick Add** button.

## Copy Information

The middle portion of the **Items** window contains copy information for each copy of the current title you have selected from your collection. To view detailed information about each copy, double-click on a copy from the list. The **Item Copy Data** window appears.

The screenshot shows the 'Item Copy Data' window with a menu bar (File, Edit, Show, Reports, Links, Window, Help) and a toolbar with navigation buttons and an 'OK' button. The window has three tabs: 'Copy Info', 'Copy Notes', and 'Copy Stats'. The 'Copy Info' tab is active, displaying a form with the following fields:

Barcode	5047	Library	CDL
Copy#	1	Location	
Volume		Shelving	
Call#	FIC CUN	Security Device	None
Policy	Fiction	Desensitize	<input checked="" type="checkbox"/>
Condition	Unknown	Purchase Cost	\$0.00
Vendor		Replacement Cost	\$0.00
Accession Date	Feb 3, 2000	Funding Source	
		Inventory Date	Feb 3, 2000

This window includes tabs with various kinds of copy information. Click on a tab to view the information in the tab window.

The following sections describe the information on each tab window.

## Copy Information

**Barcode**—Each copy has a unique barcode number. A barcode number is required for every copy. Barcodes can be up to 15 digits. Alexandria assigns these numbers based on the value you enter in the **Item Management** preference window. You can highlight and type over numbers in the field to change them. The copy barcode is shown at **852\_p** in the MARC tag.

However, if you attempt to manually enter an item barcode number that is less than *three* alphanumeric characters, Alexandria will display a warning message and disable the **Save** feature until the user has changed the barcode.

**Copy#**—Alexandria assigns each copy a number when it is added. You can type over the copy number to change it. Duplicate copy numbers are allowed. The copy number is simply an alternative identification number for the library's use. Alexandria uses the barcode number to uniquely identify copies. If you import items, the copy number will not change, even if the number is already used by another copy in the system. The copy number is shown at **852\_t** in MARC records.

**Call#**—A copy call number is "inherited" from the title's call number, unless it's replaced with a copy-specific call number. The copy call number is shown at **852\_h** in MARC records.

**Volume**—A copy's volume is "inherited" from the title's volume number, unless it's replaced with a copy-specific volume number. The copy volume number is shown at **852\_v** in MARC records.



**Policy**—The copy policy is “inherited” from the title policy unless it’s manually changed by the librarian.

**Condition**—Allows the librarian to specify a condition for the copy. You can create a report to track copies by their condition.

**Vendor**—Allows the librarian to specify the vendor from which the copy was received.

**Accession Date**—This is the date the copy was entered into Alexandria. The default for this field is the current date. You can generate reports and search based on this accession date.

**Library**—This code specifies which collection a copy is associated with. Typically, this is used only for multi-collection systems. The Collection is shown at **852\_a** in MARC records. When this value matches the collection code for your library, its considered part of your library collection. The **Library ID Code** on the **Local Library Information** preference window is used as the collection (library) code for all copies in your library.

**Location**—This information appears on the **Researcher Workstations** to help patrons find items. Patrons look for items in your library by call number. If you have items outside the library or in an unusual place in the library, enter that location here. For example, you might enter “Computer Lab” for computer disks or “Music Room” for audio tapes. Location is shown at **852\_b** in MARC records.

**Shelving**—A second location indicator option if you want to further detail the location of items on specific shelves at your location.

**Security Device**—Indicate the type of security tag this copy uses so that it can be sensitized and desensitized correctly. Default is **None**.

**Desensitize**—When checked, the self-service terminals will desensitize the indicated **Security Device** on checkout and re-sensitize it on check in. Use should not use this option on items that can be potentially damaged by magnetic desensitization (i.e. videocassettes, cassette tapes, etc.).

**Purchase Cost**—Used for logging purchase costs of the copy. If you do not enter a price, Alexandria uses the item policy default average for determining the cost of an item. Copy cost is shown at **852\_9** in MARC records.

**Replacement Cost**—In many libraries, patrons are charged a replacement cost for a lost item rather than the library’s purchase cost. The replacement cost defaults to the purchase cost, but can be modified later by the librarian as replacement costs change.

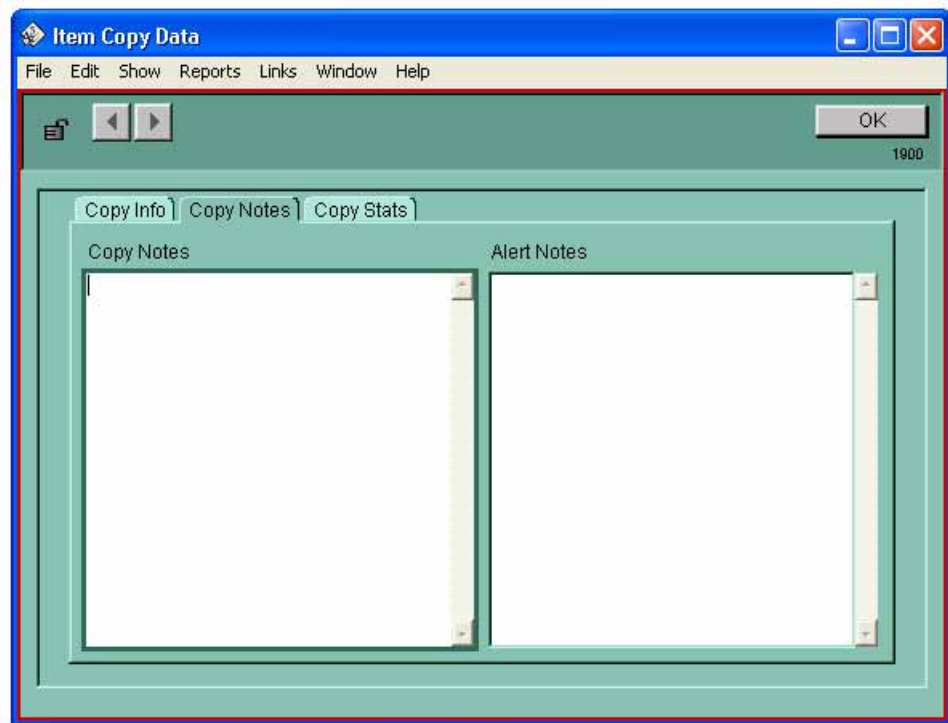
When the “value” of a copy is required, Alexandria first checks to see if a replacement cost is available. If the replacement cost is \$0 . 00, then Alexandria checks to see if a **Purchase Cost** is available, if that’s also \$0 . 00 then Alexandria tries to use the **Average Replacement Cost** of the **Copies** policy. If that value is also \$0 . 00, then a value of \$20 . 00 is used.

**Funding Source**—This identifies the funding source for the copy. It can be used when you generate reports, including reports that list all items purchased from a specific funding source.

**Inventory Date**—This is the date the copy was last inventoried, circulated, or marked used in the system. Alexandria automatically inventories items when they are circulated. You can print a report of all items that haven’t been circulated (inventoried) since you last inventoried your collection, then inventory only those items. The inventory date is automatically set to the date the copy was imported and added to the collection.



## Copy Notes



**Copy Notes**—Enter general comments about this copy. When a copy has notes, a **Notes** icon appears in the **Current Item** section of the **Circulation** window. For example, if a copy is damaged, you can document the damage in this field. Click the **Notes** button to view the copy notes. Copy notes are shown at **852\_z** in MARC records.

**Alert Notes**—This field is used to make the librarian aware of special circumstances regarding a specific copy. When a copy circulates with multiple parts, the **Alert Notes** can remind you (on check out and check in) that it includes multiple parts (if that information is entered). When the copy is accessed from the **Circulation** window, an **Alert Note** window appears. Alert notes are shown at **852\_x** in MARC records.

If a copy has *any* notes at all, a “note” icon will appear below the default item picture in the **Current Item** section of the **Circulation** window. Enter the “++” command in the command line to view notes for that item.

## Copy Statistics

The **Copy Stats** tab includes statistics about the items use. Alexandria automatically generates this information and you *cannot* modify it. This screen also includes copy history, the names and barcodes of the patrons who borrowed this copy, and the last user who modified it (*requires security to be activated; see Table , "Administration Preferences," on page 65*).

The screenshot shows a software window titled "Item Copy Data" with a menu bar (File, Edit, Show, Reports, Links, Window, Help) and a toolbar with navigation buttons and an "OK" button. The window contains three tabs: "Copy Info", "Copy Notes", and "Copy Stats", with "Copy Stats" currently selected. The "Copy Stats" tab displays a list of statistics for a specific item.

Barcode.....	5047
Copy Number.....	1
Checkout Count.....	0
Days in circulation.....	0
Date of last use.....	None
Checked out by.....	1002 Mark Arias
Copy policy.....	FIC
Reservations pending.....	0
Last Modified.....	Nov 30, 2000

## Title Publication

The bottom-half of the **Items** window shows **Title Information** for each item you have in your collection.

You cannot view or edit copy information until the title information is saved.

## Publication

The data fields in the **Publication** tab contain item publication information.

The screenshot shows the 'Publication' tab selected in a window with other tabs like 'Subjects', 'Categories', 'Notes', 'Summary', 'Statistics', 'Attachments', 'SP', and 'Misc'. Below the tabs, there are five labeled input fields: 'Publisher', 'Place', 'Year', 'Series', and 'Extent'. Each field has a text entry area to its right.

**Publisher**—Enter the name of the publisher. Saved in MARC Field **260\_b**.

**Place**—Enter the place of publication. Saved in MARC Field **260\_a**.

**Year**—Enter the year of publication. Omit ending punctuation. Estimated dates are enclosed in brackets. Saved in MARC field **260\_c**.

**Series**—If the item is part of a series, enter the series name here. Otherwise, leave this field blank. Saved in MARC field **440\_a**.<sup>1</sup>

**Extent**—Enter physical information about the item (e.g. number of pages, total playing time, number of slides, illustration information). You can specify which subfield the extent data is saved in by following AACR2 rules of punctuation.

**300\_a** (Extent), has no preceding punctuation.

**300\_b** (Other Physical Details, such as illustration info), preceded by a colon.

**300\_c** (Dimensions), preceded by a semicolon.

**300\_e** (Accompanying Material), preceded by a plus sign.

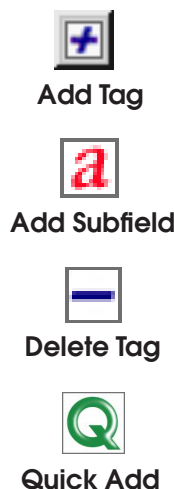
For example: 300\_aFilmstrip\_bColor\_c35mm\_eSound cassette.  
is shown as: "Filmstrip: Color; 35mm +Sound cassette."

Another example: 300\_a161 pp.\_c22 cm.\_e161 pages with illls.  
is shown as: "161 pp.; 22 cm.+161 pages with illls."

1. If you <option-tab> (Macintosh) or <ctrl-tab> (Windows) out of this field (or you have **Enable Authority Control** turned on in **Miscellaneous, Display Setting** preference window), an **Authority Control Series Search** check dialog will appear, allowing you to see if this series is already in your collection. If it is, the **Authority Control** window will not appear.

## Subjects

This tab leads to the **Subject Editor** and defines subject entries.



Tag	Subfield	Value
650	a	Topical term or geographic name as entry element
	x	General subdivision
	y	Chronological subdivision
	z	Geographic subdivision

The **Subjects** tab allows the user to catalog these subjects:

- 600 - Personal Name
- 610 - Corporate Name
- 611 - Meeting Name
- 630 - Uniform Title
- ✓ 650 - Topical Term
- 651 - Geographic Name
- 655 - Index Term (Genre/Form)

Each new subject you add will default to the **650\_a\_x\_y\_z**. You can change the tag only to those listed above. Any others can only be added from the **MARC View** window. You can also change any tag or subfield as desired. Tags will always sort in numerical order when the title is saved. Subfields save in the order they are displayed or entered. There is no sorting for Subfields.

- ✓ 2 - Source of heading or term
- 3 - Materials specified
- 6 - Linkage
- 8 - Field link and sequence number
- a - Topical term or geographic name as entry element
- b - Topical term following geographic name as entry element
- c - Location of event
- d - Active dates
- e - Relator term
- v - Form subdivision
- x - General subdivision
- y - Chronological subdivision
- z - Geographic subdivision

Information that you enter in this window is used when patrons search the collection. For example, if you add "Mythology" in the **650\_a** column, users can search the collection for "Mythology" and these items will be included in the results.

The subjects you enter must be at least two characters long and can be a single word or phrase. Click in different subject categories to edit subfields.

To remove a subject, highlight it and press the <delete> key on your keyboard or use the **Delete Tag** icon to the left side of the **Tag#** field.

Users unfamiliar with MARC editing can also quickly add numerous subject entries by clicking on the green **Quick Subject Entry** icon ("Q"). Users will be able to type in multiple subjects quickly. When they have finished, clicking the **OK** button will add these subjects to the **\_a** subfield of the **650** tag.

The **Subjects** tab allows the librarian to edit and create any **tag**. For each **tag** you add, a separate line is created with default subfields. General **650** subjects will default with the topical data in **\_a**, the general data in **\_x**, chronological data in **\_y** and geographic data in **\_z**.

**General Topic (\_a)**

**Geographic (\_x)**

**Chronological (\_y)**

**Geographic (\_z)**

**- N O T E -**

Every term in MARC subject fields are cataloged by Alexandria and can be searched by Alexandria Researcher and used for reports.

## Categories

This tab provides a way to group items into custom categories specific to your location. Category groupings make it easier to access related items in your collection.

When you add text to the categories in this window, patrons can search the text and find items in your collection. For example, you can create groups in the **Curriculum** column for a particular teacher's class. You can then catalog the books for that class with that **Curriculum** value. When students search the curriculum group, the search results will display all books required for that teacher's class.

**Bibliography**—Used to create bibliographies of interest to patrons. An item may belong to several different bibliographic categories. Since this is an Alexandria-defined field, it's not displayed in the **MARC View** editor.

**Curriculum**—Contains curricula information for a title. For example, items that Ms. Andres is using in her Geography 212 class can include Curriculum categories such as "GEOGRAPHY 212" and "Ms. Andres". From an Alexandria Researcher, students can search for items by teacher or course name. Reports can be sorted by Curriculum. Since this is an Alexandria-defined field, it's not displayed in the **MARC View** editor.

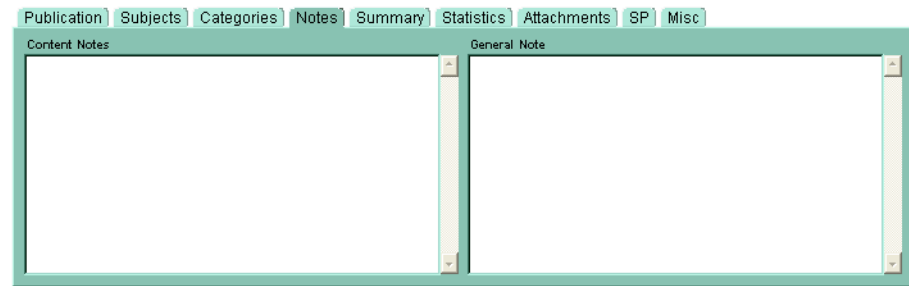
**Interest Code**—Contains information regarding the items intended audience. Be consistent in how you enter the values in this field and be sure your patrons know what values to search for (e.g. if you enter "8th grade" as an interest category, be sure your patrons know to enter "8th grade" rather than "Eighth Grade").<sup>1</sup> Interest level data is saved in MARC tag **521\_a**.<sup>2</sup>

1. The interest code is not always so specific. Another example would be 7-10 (meaning age) or Junior High School to College Students.

2. Depending on the MARC indicator, it can be more specific. **521 00\_a** could be reading level [3.4]. **521 10\_a** could be interest age level [7-10]. **521 20\_a** could be interest grade level [K-3].

## Notes

This tab contains content and summary notes.

The screenshot shows a software interface with a series of tabs at the top: Publication, Subjects, Categories, Notes, Summary, Statistics, Attachments, SP, and Misc. The 'Notes' tab is currently selected. Below the tabs, there are two large, empty text input areas. The left area is labeled 'Content Notes' and the right area is labeled 'General Note'. Both areas have vertical scrollbars on their right sides, indicating they can hold multiple lines of text.

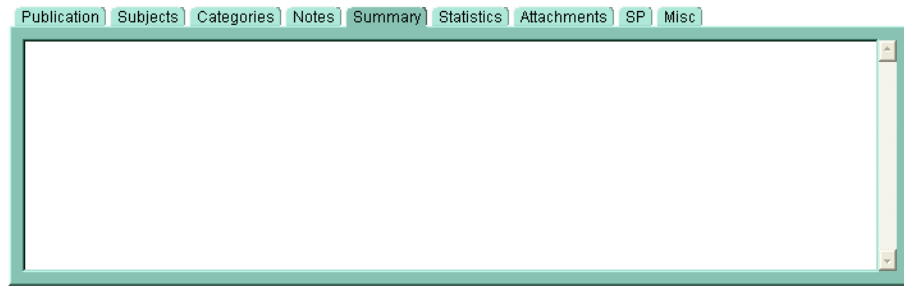
**Content Notes**—Contains notes about the item’s content. For example, **Content Note** for an anthology may list the works included within the anthology.

You may separate contents by pressing the <return|enter> key after a content entry; this will automatically create the proper MARC content separator (in this case, <space>--<space>) in the MARC tag. Only the first **505\_a** content note in the MARC record is displayed in this window.

**General Notes**—Contains the first **General Note** for this title. Only the first **500\_a** note in the MARC record is displayed in this window.

## Summary

Contains a summary of the title.



The summary appears in the **Item Details** window and can be viewed for easy reference. If a patron knows what a book is about but not the title or author, they can search for the item by words in the summary.

Only the first **520\_a** summary note in the MARC record is displayed in this window.



## Statistics

The **Statistics** tab shows information that is collected automatically during circulation. This information helps assess library and item usage. It can be used for ordering additional copies of items in high demand or weeding out infrequently used items. The information displayed is a summary for all copies, and cannot be modified.

The screenshot shows a web interface with a tabbed menu at the top: Publication, Subjects, Categories, Notes, Summary, Statistics (selected), Attachments, SP, and Misc. Below the tabs is a checkbox labeled "Don't Show in Alex Researcher". The main content area displays the following statistics:

Copies Available.....	1/1	Accession Date.....	Aug 19, 2002
Lifetime Checkouts.....	0	First Use Date.....	None
Last Modified.....	Aug 19, 2002	Last Use Date.....	None
by .....			

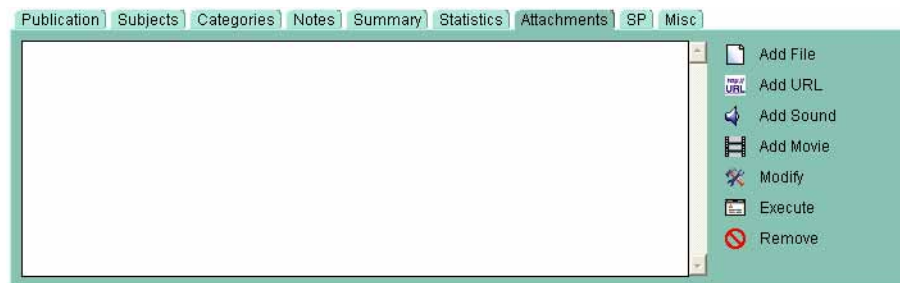
Below the statistics, it says "No stats recorded."

If you have a multi-collection Alexandria License and are using the District Librarian client, an additional window will be visible showing all the collections available in your database. Each collection has its own statistics information.

**Don't Show in Alexandria Researcher**—Use this checkbox if you don't want an item to show when a patron performs a search. When you search from the Librarian Workstation and this item is found, it appears in the results window followed by an asterisk ("\*"). This indicates that it's in the collection, but patrons are unable to see it in their Search results. This setting applies to all copies in all collections within the database.

## Attachments

The **Attachments** tab shows documents, videos, URLs and other items that are attached to the title record. Attachments also appear on the **Details** window when an item is found through a search. The patron can click an attachment to view or launch it from the **Details** window.



You may attach URLs, files, sounds or movies by dragging their icons to the attachment list or clicking on the associated icon and selecting the file. To add an URL, click on the icon and enter the full URL.

Double-click on any item in the list to edit the attachment specifications. <Option>-double-click (Macintosh) or <ctrl>-double-click (Windows) on any item in the list to view the original document or URL.

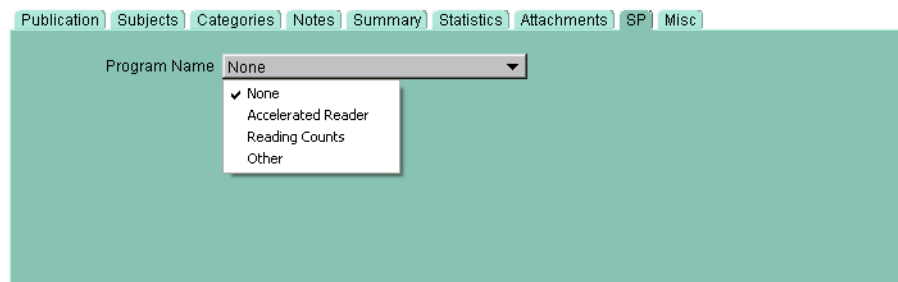
When you have added attachments, click **Save** at the top of the **Items** window to save the attachments. To remove an attachment, select the attachment in the list and click **Remove** or press the <delete> key.

### - N O T E -

Make sure that the applications required to open particular attachments are installed on your machine. For example, Quick Time is required for ".avi" movies, some image formats require the proper image manager, ".pdf" documents need Adobe Reader, and so on. Be certain to have the appropriate programs installed.

## SP

The **SP** (Study Program) tab is used to record information for special programs such as **Accelerated Reader** and **Reading Counts**. For example, if you are using the **Accelerated Reader** program, select it from the drop-down menu and edit data for this entry. This data is stored in the **526** tag according to MARC standards for study programs. If you are using a study program other than **Accelerated Reader** or **Reading Counts**, you can create your own by selecting **Other** from the drop-down menu and filling in the study program name in the box provided.



Publication Subjects Categories Notes Summary Statistics Attachments **SP** Misc

Program Name None

- ✓ None
- Accelerated Reader
- Reading Counts
- Other

**Program Name**—Choose either a default study program or select **Other** to create a title for your own study program.

**Interest Code**—These two drop-down menus allow you to select the grade level interest range. For example, if your study program is for patrons with a level of 7 through 10, enter “7” in the first drop-down menu and “10” in the second.

**Reading Level**—This is the estimated reading level of the item (e.g. 3.4 means 4th month of the 3rd grade)

**Point Count**—The number of points received for passing a test on an item.

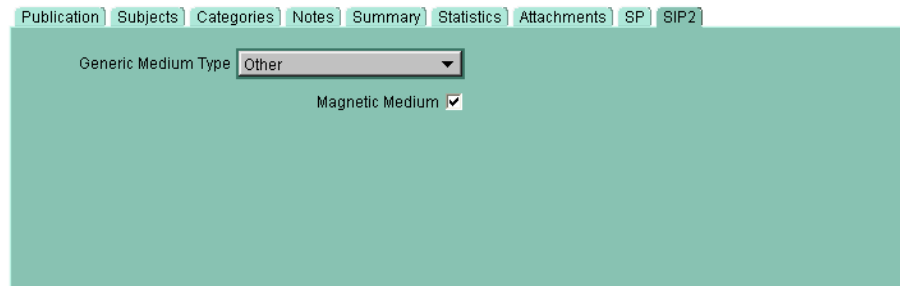
**Test Number**—This is the number of the test for an item.

**Holding Code**—This is the location of the item (i.e. the Library Code).

**Indexed**—This check box allows the user to indicate that they currently have the test for this item and want this information searchable.

## Miscellaneous

This tab is used to identify whether the title is a magnetic medium, or has any kind of magnetism that could be damaged when swiped through an automated desensitization security device.



The screenshot shows the 'Miscellaneous' tab selected in a series of tabs at the top: Publication, Subjects, Categories, Notes, Summary, Statistics, Attachments, SP, and SIP2. Below the tabs, there is a form with a label 'Generic Medium Type' followed by a drop-down menu currently showing 'Other'. Below this, there is a checkbox labeled 'Magnetic Medium' which is checked.

**Generic Medium Type**—Use this drop-down menu to select the title's medium type. If you already have a medium type specified from the primary information section of the **Items** window, the **Generic Medium Type** field will automatically try to match them by making an educated guess. If the medium you have selected is usually a magnetic medium (e.g. a VCR tape), then the **Magnetic Medium** checkbox (see description below) will automatically be checked. However, you can further customize this depending on the title in question. If you have a medium type of **Video Tape**, and you're applying it to a reel-to-reel film, you can uncheck the **Magnetic Medium** box because it can't be demagnetized going through an automated desensitization security device.

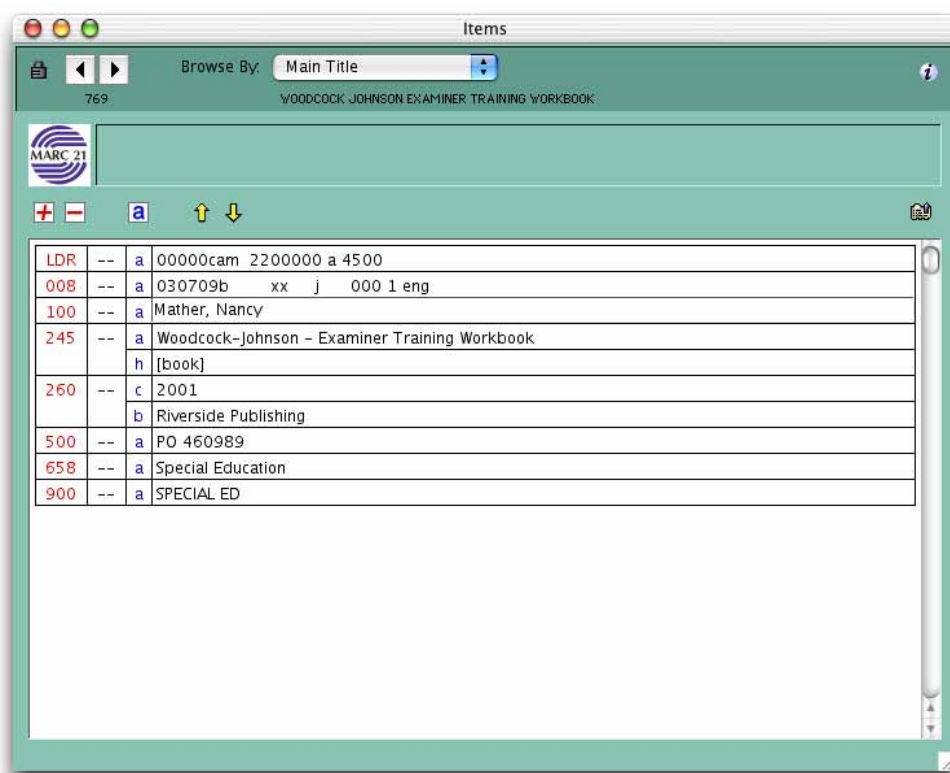
**Magnetic Medium**—Use this checkbox to tell Alexandria whether a specific title is classified as a magnetic medium.

## Items

Switch to MARC View	Ctrl+M
First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Browse	Ctrl+B
Find	Ctrl+F
Unlock Record	Ctrl+U
New Title	Ctrl+N
Remove Title	Ctrl+R
Modify Copy	
Add Copy	Ctrl+Y
Remove Copy	
Move Copy To This Title	
Duplicate	Ctrl+D
Paste Item Picture	
Remove Item Picture	
Show Details	Ctrl+Shift+D
Show Title Editor	Ctrl+Shift+T
Show Author Editor	Ctrl+Shift+A

## MARC View Editor

Select **Switch to MARC View** in the **Items** menu. When you do this, you'll see a window like the one below and the **Items** menu will now appear as shown to your left.



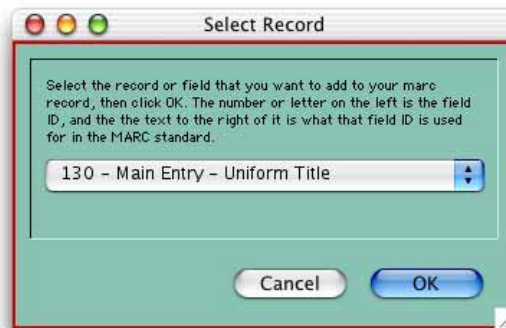
The **MARC View** editor is designed to allow MARC-knowledgeable librarians the ability to modify information in the MARC record. You can edit, add or remove tags, indicators, and subfield data. The MARC editor confirms that any changes you make are syntactically correct (i.e. that they are still in a valid MARC format). However, the editor provides no checking for MARC standards in the data you enter. Although Alexandria will allow you to enter any data you like, only specific MARC data is used by Alexandria. Any additional information is retained for reference or future purposes only.

Before records can be changed, they must be unlocked by using the **Unlock** button or command. (see "Changing Records" on page 50).

## - N O T E -

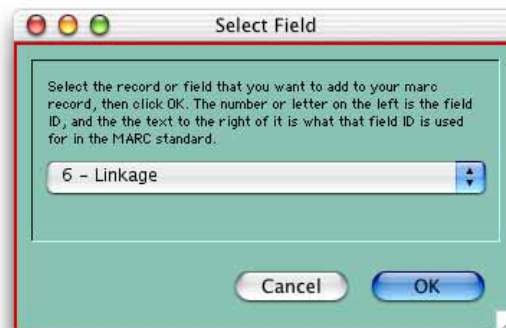
Changes to the MARC record are *only* saved if you press the **Save** button at the top of the window. If you select **Revert**, all changes are discarded and the record reverts to its previous state.

- To add a new tag, click on the red “+” button located at the top-left of the MARC View window. The following window will appear:



Using the drop-down menu, select the MARC tag you would like to add to the item record. When you are satisfied that you have the correct record, click on **OK**. If you are unsure, click **Cancel**. In this example, a new **130** tag would be created if the user were to click **OK**.

- To remove an existing tag, select (highlight) the tag number from the MARC field and then click on the red “-” remove button. You will be asked if you are sure you would like to remove the tag. If you choose **Yes**, the tag will be removed.
- Subfields are shown in the third column and are limited to a single letter or number. Use the blue “a” button at the top of the **MARC View** window to add a new subfield. A window similar to the following will appear:



Using the drop-down menu, select the MARC field you would like to add to the item record. When you are satisfied that you have the correct subfield, click on **OK**. If you are unsure, click **Cancel**. In this example, a new **6** linkage subfield would be created if the user were to click **OK**.

- All pertinent data for the subfield is shown and can be edited or entered in the fourth column.
- To edit a tag’s indicator, click on an indicator from the indicator column (second column from the left in the **MARC View** window). This will highlight the indicator in question and allow you to type a new value over the existing.
- Tags between **001** and **009** have no indicators or subfields. They can be edited as a stream of characters. A special editor is available for the **008** tag.

- To edit the **008** tag, click on it. If the record type is “a” then the following editor is available to make syntactically correct changes.

**Book Editor (Tag 008)**

File Edit Show Reports Links Window Help

General Material Info | Book Specific Fields

Illustrations	<input type="text"/>	18-21 - Up to four one-character codes that indicate the presence and types of illustrations in the item. Left justified.
Target Audience	Unknown or not specified	22 - A one-character code that indicates the audience for which the item is intended.
Form of Item	None of the Following	23 - A one-character code that indicates the form of material for the item.
Nature of Contents	<input type="text"/>	24-27 - Up to four one-character codes that indicate whether a significant part of the item is or contains certain types of material.
Gov't Publication	Not a Government Publication	28 - A one-character code that indicates whether the item is published or produced by or for a government agency.
	<input type="checkbox"/> Conference Publication	
	<input type="checkbox"/> Festschrift	
	<input type="checkbox"/> This Item Contains an Index	
Literary Form	Not fiction	33 - A one-character code that indicates the literary form of material for the item.
Biography	Collective biography	34 - A one-character code that indicates whether the item contains biographical material.

Cancel OK

**Book Editor (Tag 008)**

File Edit Show Reports Links Window Help

General Material Info | Book Specific Fields

Date of entry	<input type="text"/>	00-05 - A six-character numeric string that indicates the date the USMARC record was created. Enter any valid date and the format will be converted.
Type of date/pub status	<input type="text"/>	06 - A one-character code that indicates and categorizes the type of dates given in 008/07-10.
Date 1	<input type="text"/>	07-10 & 11-14 - For most records data is derived from information in field 260 (Publication, Distribution, etc. (Imprint)), field 382 (Dates of Publication and/or Volume Designation), or from note fields. <space> - not applicable u - partially unknown.
Date 2	<input type="text"/>	
Place of publication	<input type="text"/>	15-17 - A two- or three-character USMARC code that indicates the place of publication. Two-character codes are left justified.
Language	<input type="text"/>	35-37 - A three-character USMARC code that indicates the language of the item. (The code is taken from USMARC Code List for Languages)
Modified	<input type="text"/>	38 - A one-character code that indicates if any data in a bibliographic record is a modification of information from the item being cataloged.
Cataloging Source	<input type="text"/>	39 - A one-character code that indicates the creator of the original cataloging record.

Cancel OK

If the MARC record is not specified as **Language Material**, then this alternative **008** editor is displayed.

The screenshot shows a Windows-style dialog box titled "Book Editor (Tag 008)". It has a menu bar with "File", "Edit", "Show", "Reports", "Links", "Window", and "Help". Below the menu bar are two tabs: "General Material Info" and "Character Editor". The "Character Editor" tab is active, displaying a message: "This record is not language material (see record type in leader - character 6). A generic character editor will allow you to manually edit this tag." Below the message is a grid of 40 character input fields, labeled "Char 0" through "Char 39". The fields are arranged in four columns and ten rows. The values in the fields are as follows:

Char 0	Char 1	Char 2	Char 3	Char 4	Char 5	Char 6	Char 7	Char 8	Char 9	Char 10	Char 11	Char 12	Char 13	Char 14	Char 15	Char 16	Char 17	Char 18	Char 19	Char 20	Char 21	Char 22	Char 23	Char 24	Char 25	Char 26	Char 27	Char 28	Char 29	Char 30	Char 31	Char 32	Char 33	Char 34	Char 35	Char 36	Char 37	Char 38	Char 39	
0	2	0	8	1	9	b									x	x													0	0										

At the bottom right of the dialog are two buttons: "Cancel" and "OK".



# Authority Control

## Authority Control

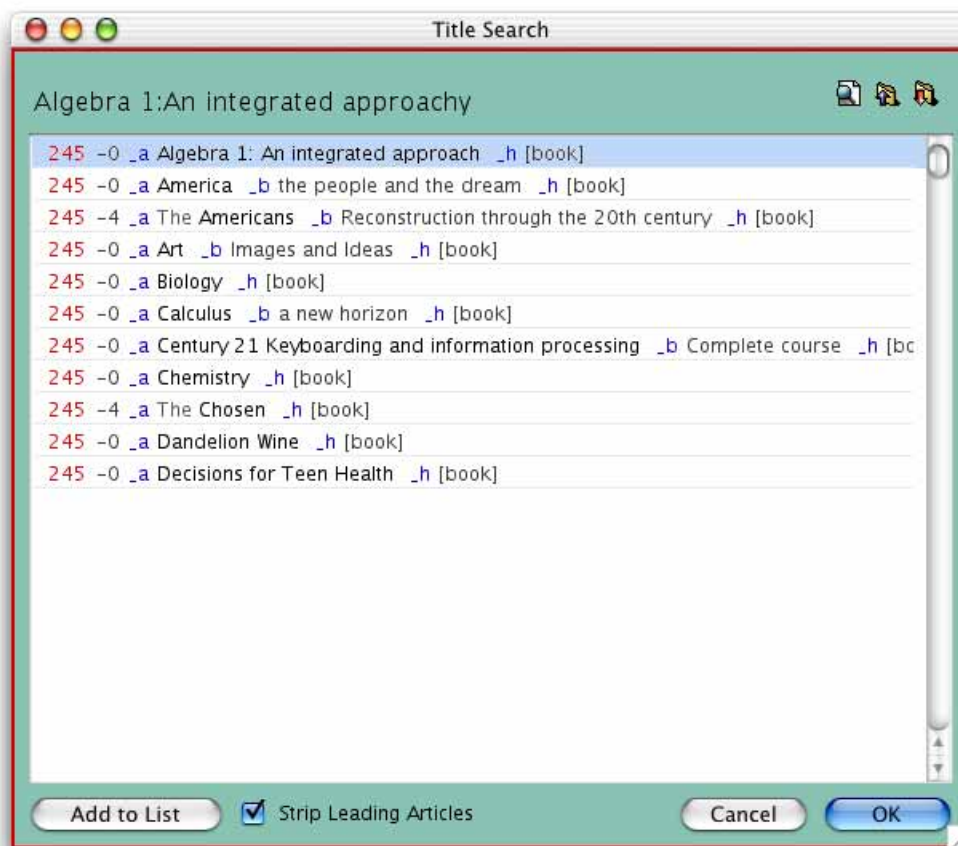
**Authority Control** is available for the following data: **Title, Author, Full Subject, Series, Curriculum, Interest Code, Bibliography, Medium, Location, Shelving, Library, Publisher, Funding Source, Homeroom, 2nd Location, School, Grade, City, and State** (see “*Authority Control Preferences*” on page 101 for setting these controls).

When **Authority Control** is enabled, every time the user <tab> out of an editable, **Authority Controlled** field, Alexandria will check to see if the newly entered data already exists within the Alexandria database. If the newly entered data is an exact match against previously existing data, the cursor will move to the next editable field without incident (unless you have your preferences set to force authority control<sup>1</sup>). If it has not, an **Authority Control** selection list appears. The user may choose to add the new and current entry or select a previously existing entry from the selection list.

When **Authority Control** is not enabled, the user can still check an editable field entry by exiting the field with an <option-tab> on Macintosh or <ctrl-tab> on Windows. If the information contained within a specific field is not authority controlled, an **Authority Control** selection list will appear. If the information *has* been controlled, the cursor will move to the next editable field without incident.

1. To learn even more ways of controlling **Authority Control**, please review the **Authority Control Preference** chapter, starting on page 101.

The example below is a **Title Search Authority Control** window. It contains a list of title record tags that most closely resemble the information that has been provided in the current entry field. The user can select previously existing information from the list by double-clicking on it or by selecting (highlighting) a line item and clicking the **Ok** button. If the newly entered information is valid, but doesn't already exist in your Alexandria database, the user may add it by clicking on the **Add to List** button.



### Automatically Building Your Authority Control Records

In most cases, after the initial Alexandria program installation, the user's first step will be to import all their patron and item record information. The first time that Alexandria recognizes information in its database that can be authority controlled (during program launch), the following message will appear:

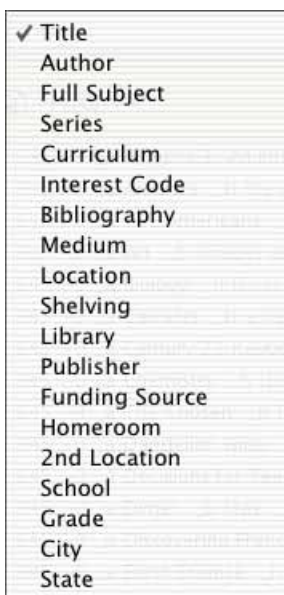
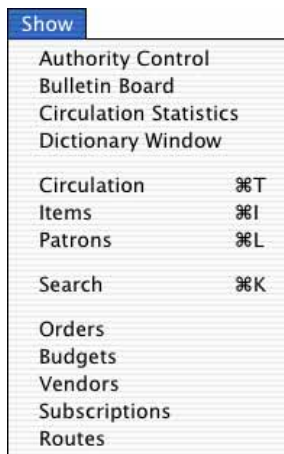


Clicking the **Cancel** or **No** button will close the **Message** window until the next time Alexandria is restarted; clicking the **Cancel** button will ignore whether or not you have placed a check in the **Do not ask this question again** box.

If you check the **Do not ask this question again** box and then click **No**, Alexandria will not create authority-controlled records based on your program data and will not ask to do so ever again. If you accidentally select this combination but would like to create authority-controlled records from your existing data, please use the **Build From Existing Records Authority Control Utility** (see “*Authority Control*” on page 488).

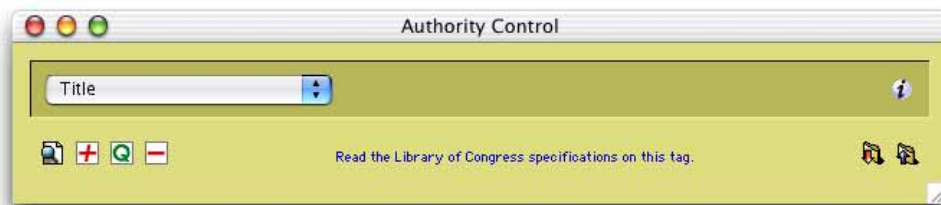
If you click **Yes**, Alexandria will create authority-controlled records based on your existing database information; it will also ignore whether or not you have placed a check in the **Do not ask this question again** box.

This **Message** window will also appear during launch after you have performed an Alexandria program update.



## Authority Control Window

To open the **Authority Control** window, select **Authority Control** from Alexandria's **Show** drop-down menu. The top of the **Authority Control** window contains one drop-down menu and six specialized buttons.



If you have created any authority-controlled data, the **Title** drop-down menu will allow you to view all the entries you have for these fields: **Title, Author, Full Subject, Series, Curriculum, Interest Code, Bibliography, Medium, Location, Shelving, Library, Publisher, Funding Source, Homeroom, 2nd Location, School, Grade, City, and State** (see “*Authority Control Preferences*” on page 101 for more information on how to authority control these fields).

The button depicting a file with the magnifying glass locates an entry in the current authority control list. Clicking on this button will open up a **Query** window. Enter the text (or a close approximation) of the term you are looking for and Alexandria will find the closest listed match.

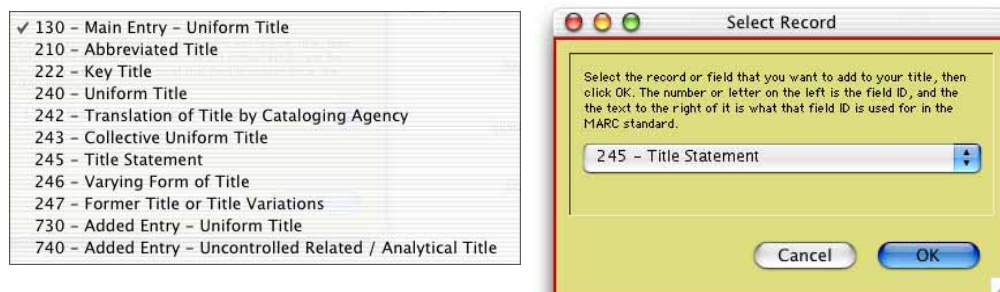
The buttons that resemble files with (blue) up and (red) down arrows (located to the far-right of the **Authority Control** window) allow you to view the next ten entries that come either before or after the current authority control list. For example, clicking on the red file down button will append your current authority control list with the next ten (in order) entries.

Review the following section to learn how to use the add, quick-add, and remove buttons.

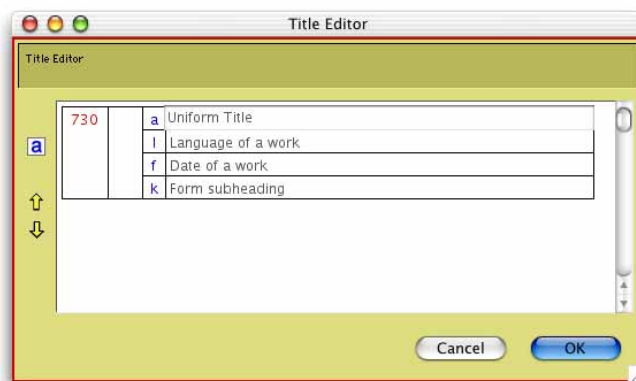
## Adding and Removing Authority Control Entries

Users also have the ability to quickly add or remove author controlled entries from within the **Authority Control** window.

To add a new authority control entry, click on the red “+” button. Once you have clicked on the **Add Entry** button, the **Select Record** window will open. Using the sole drop-down menu located on this window, select the record type for which you would like to add an authority-controlled entry, and then click **OK**. In the drop-down menu, the numbers or letters to the left of the descriptive text are the MARC tags, and the text to the right of the MARC tags describe what the field is used for in the MARC standard.



Once you select the record type you would like to create a new entry for, a **Title Editor** window similar to the following will appear.



To add a new subfield entry, click on the blue “a” button. Doing so will open a **Select Field** window that is similar to the **Select Record** field described above. Using the sole drop-down menu located on this window, select the subfield type that you would like to add to the record and click **OK**. Once you have selected a subfield from the drop-down menu, the subfield tag will be added to the MARC record. The subfields contained within the drop-down menu will change depending on the selection you made for your record title.

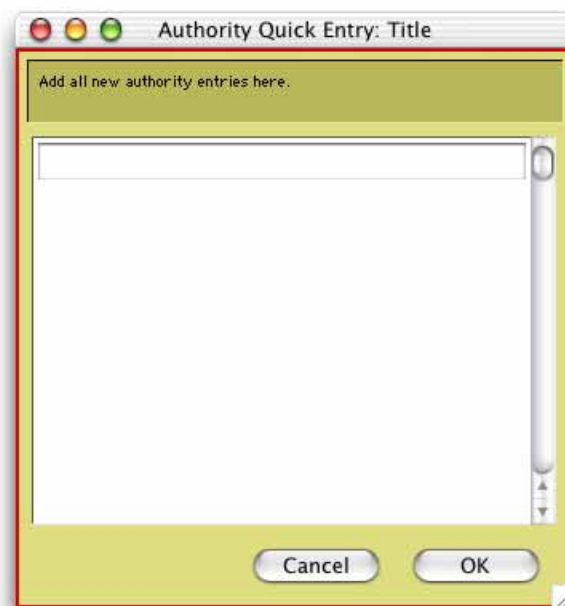
The yellow up and down arrows will change the position of the selected (highlighted) subfield within the record; thus, a particular record’s subfield hierarchy can be changed.

When you have finished adding all your title and subfield information, click the **Ok** button located at the bottom right of the **Title Editor** window. You will be returned to the **Authority Control** window, with your new entry added to the current authority control list. Click **Save** to keep your changes or click **Revert** to discard them.

## Authority Control Quick Entry

For those who are not comfortable with the complexities of MARC records, Alexandria features an additional way to quickly add entries to the authority control window. Although you do not have the option of adding additional or different subfields to the record type (selected from the drop-down menu of the **Authority Control** window), you can use this window to quick add several authority-controlled fields and records.

To open the **Authority Quick Entry** window, click on the green “Q” button.



A cursor will appear in the field on the Authority Quick Entry window. Type the **Title, Author, Full Subject, Series, Curriculum, Interest Code, Bibliography, Medium, Location, Shelving, Library, Publisher, Funding Source, Homeroom, 2nd Location, School, Grade, City, or State** you would like to have authority controlled and press enter. When you have successfully added all the information you require, click **OK**; click **Cancel** to discard any information that you have entered in this window. Please keep in mind that this window will force everything you’ve entered into *one* subfield of that particular tag instead of placing each separate part into the appropriate subfield.

Clicking **OK** will return you to the **Authority Control** window, with your new entry added to the current authority control list. Click **Save** to keep your changes or click **Revert** to discard them.

## Circulation

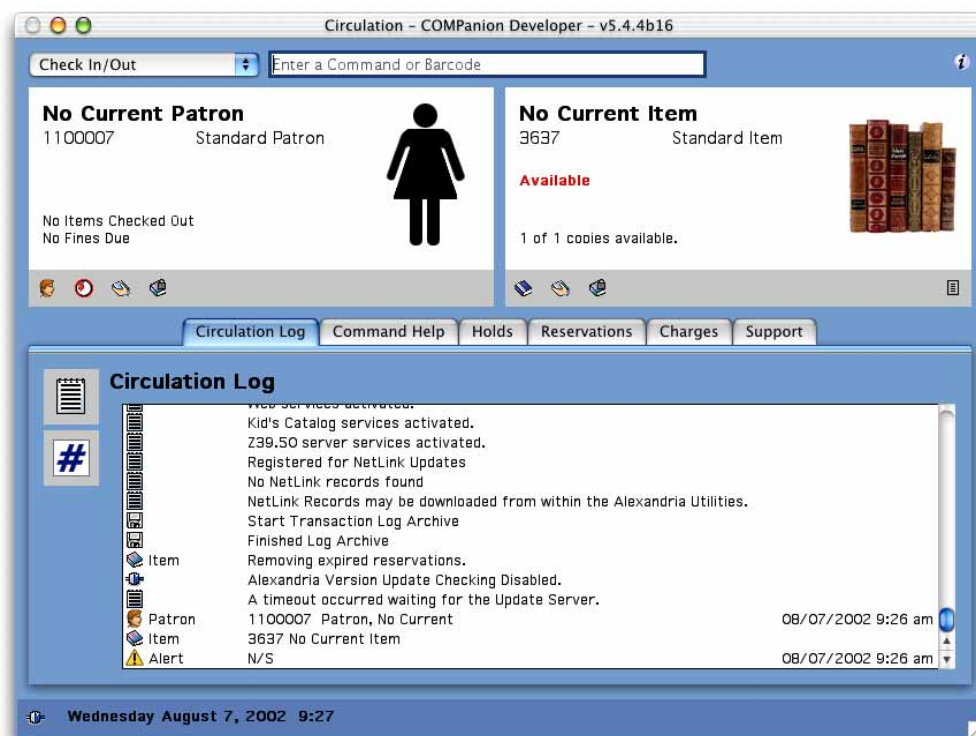
This chapter describes how to use the **Circulation** window and how to complete daily activities within your library.

### The Circulation Window

The **Circulation** window is the main window at the Librarian Workstation. Use this window to enter library transactions. You can also issue books, place hold requests and reservations, process fees, fines, payments, and renew books. You can also complete special functions such as inventory, cataloging, record updating and viewing.

Use any of the following methods to display the **Circulation** window.

- Select **Circulation** from the **Show** menu.
- Press <Cmd-t> on the keyboard.
- Select **Circulation** from the **Windows** menu.





## Modes, Commands and Help

The top portion of the **Circulation** window shows the active mode, the command line, and the **Help** button.

- A **mode** is simply a function for which you may want to process many patrons or items. For example, **Bookdrop**, **Check In/Out**, **Hold**, and **Renew** are all modes.
- The **Command Line** is where you enter a barcode for a patron or item, or you may enter a command. If you enter only a barcode, the mode (shown to the left of the command line) determines the action that is performed.
- Click the round **Help** button to open the **Command Help** tab on the bottom of the **Circulation** window, detailing a list of available commands and an explanation of how to use each one (see “*Command Help*” on page 231).

## Current Patron and Current Item Information

The upper-middle portion of the **Circulation** window displays general information about the current patron and current item.

### - N O T E -

Many Alexandria functions depend on the Current Patron or Item. For example, you must have a Current Patron to check out, hold, or reserve an item.

- Click the **Details** button in the patron or item section to view more detailed information about the current patron/item.
- Click the **Notes** button in the patron or item section to view notes entered for a particular patron/item. You enter the notes for a patron in the **Notes** tab in the **Patrons** window. You enter notes for an item in the **Copy Notes** tab of the **Items** window.
- You can also select **Show Patron Details** or **Show Item Details** from the **Circulation** menu to view the same information as the **Details** button.



## Using the Circulation Window

This section describes how to use the **Circulation** window tabs and **Circulation** menu to complete transactions in your library.

### Using the Command Line

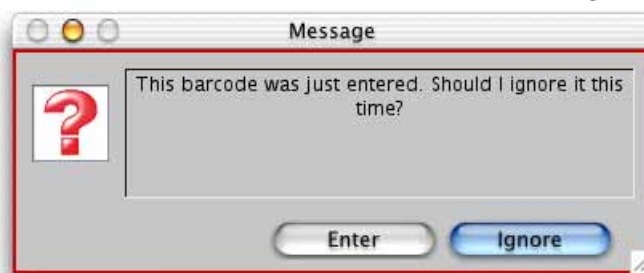
There are several ways to use the command line.

#### Enter a barcode.

You can enter a barcode manually by typing the number and then pressing <enter>, or scan a barcode using a barcode reader.

When you enter a barcode, the action that takes place depends on the current mode (which is displayed to the left of the command line). For example, if your current mode is **Check In/Out** and you enter barcode "13456", item 13456 is checked out to the current patron.

If you enter the same barcode number twice in a row, this warning message appears.



#### - N O T E -

When you enter barcodes via portable readers, Alexandria will ignore duplicate entries that appear side by side.

- **Enter a command and a barcode.**

For actions other than those displayed in the mode field, enter a command followed by the barcode and press <enter>. Doing so will apply that action to the individual barcode you enter. It does not change the mode. Therefore, if you're in Check In/Out mode, entering the command of "B 13456" performs a bookdrop for item 13456.

- **Enter a command without a barcode.**

If you enter a command without a barcode, the current mode will change. For example, if you enter "H" and press <enter>, the mode is set to **Hold**. You can then enter (or scan) a barcode for each item that you want placed on hold for the Current Patron.

#### - S H O R T C U T -

An equal sign "=" is used as a shortcut for the **Current Item** barcode. Thus "H=" places a hold on the current item.



## Transaction Log

The **Transaction Log** tab on the **Circulation** window displays the transaction log. This logs information for each transaction that you complete and any operations that you perform.



Select **Print** from the **File** menu to print the log. The transaction log is automatically saved by Alexandria according to the preferences you've selected (see "*Circulation Preferences*" on page 109). Logs are saved inside the **Log** folder, located in your **Alexandria 5.4.4** program directory.

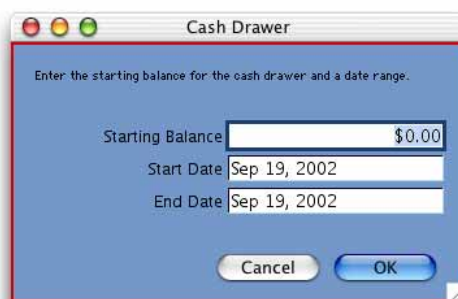


## Status

Shows a quick count of how many transactions have been performed in your library and how many concurrent downloads are taking place.



**Cash Drawer**—If your school or library uses a cash drawer, enter the starting balance for the drawer and the date range duration that the register stays open.





## Command Help

Click the round **Help** button to the right of the command line on the **Circulation** window to access the **Command Help** tab. This tab contains information about commands and how to use them.

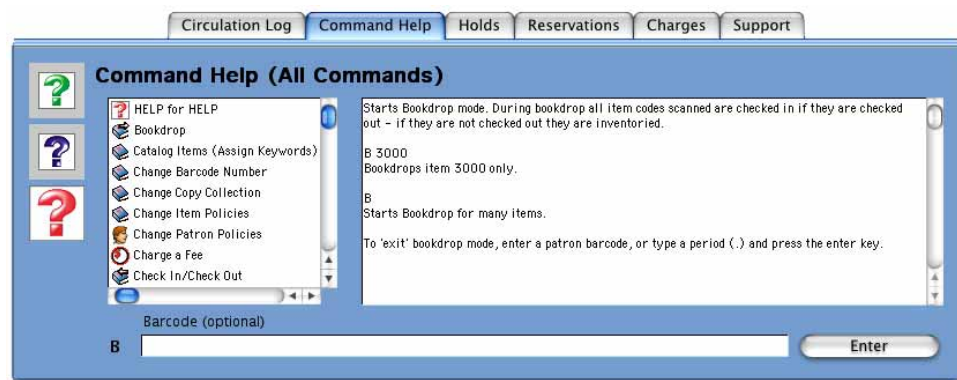
There are three colored question marks in the **Command Help** tab that represent different help commands.

The **green** question mark will open **Common** command information.

The **blue** question mark will open **Data Manipulation** commands information.

The **red** question mark will open **All Commands** information.

When you select a command from the list in any of the **Command Help** fields, it describes the functionality of that command and also contains the command letter and a blank field where you may enter the barcode and any additional information for that command.



Type or scan a barcode; this executes a command for the barcode that you enter. The **Circulation** window then appears.

If you select a command and click **Enter** without entering a barcode, the action taken depends on the command you selected. For example:

- If the command you select is a mode, Alexandria changes the current mode and displays the **Circulation** window under this mode.
- If you select the locate command (see *“Locating Patrons and Items” on page 270*), a **Lookup** browse window will appear. You may then make a selection from the **Browse** window.
- If the command you select performs a circulation function, then that function is performed, the **Circulation** window will appear, and the transaction log records the results. For example, if you select the **Hold Request** command and enter a barcode, Alexandria puts a hold on the item and the **Circulation** window will appear, appropriately logging the entry.

## Holds

When an item is not available, a patron can place a hold request for it. When that item is returned to the library, a message appears on the Librarian Workstation asking to hold that item for the requesting patron. An item waiting to be claimed is shown in the hold queue as an in-stock item<sup>1</sup>.

### - N O T E -

Hold requests differ from reservations. A hold request puts your name in a hold queue (a waiting list) to check out an item when it becomes available. A reservation checks out a specific copy in advance for a set time.

If more than one patron requests a hold for a particular item, Alexandria keeps a list of those patrons in the order that they requested the item. This is called a hold queue.

Your circulation policies determine how long a hold request may stay active (*see "Circulation Policies" on page 149*). An expiration date for the hold is shown in the transaction log when the hold is placed.

Alexandria will update the hold queue each day. If an hold item is not claimed by the expiration date, it is reassigned to the next patron in the hold queue. If no other patrons are waiting for the item, then it is released for general circulation. This activity is also recorded in the transaction log.

You can print a list of in-stock items using **Circulation Reports** in the **Reports** menu.

## Placing a Hold Request

**Command:**   H {item barcode}

**Placing a Hold Request**—Use the "H" command to place a hold on an item for the current patron or to begin **Hold** mode.

- To hold an item for the current patron, type "H" and then type (or scan) the item's barcode number and press <enter>.

If you do not know the item's barcode number, locate it using one of the find commands (*see "Locating Patrons and Items" on page 270*).

- To start **Hold** mode, type "H" and press <enter>. A hold request is placed on each item whose barcode you type (or scan) while in **Hold** mode. To exit **Hold** mode, type (or scan) a new patron barcode number or use the "X" or "." command. A current patron is required.

### - S H O R T C U T -

You can enter an equal sign "=" as a shortcut for the current item barcode. Thus, "H=" places a hold on the current item.

<sup>1</sup>. An in-stock hold is actually a special type of checkout. To remove an in-stock hold, either check out the item to a requesting patron, or bookdrop the item. When performing a bookdrop, if other hold requests are pending, an in-stock hold is created for the next patron in the hold queue.

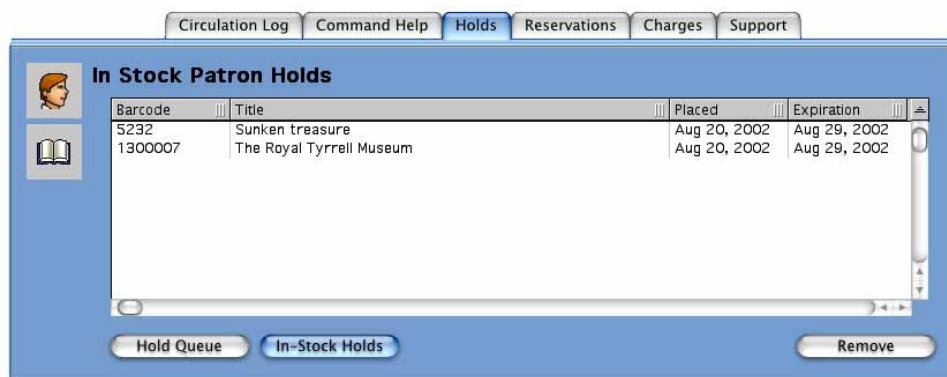
## Circulation

Start Bookdrop	⌘1
Make Charges/Payments	⌘2
Show Patron Details	⌘3
Patron Holds	⌘4
Patron Reservations	⌘5
Show Item Details	⌘6
Adjust Item Holds	⌘7
Remove Copy Reservations	⌘8
Renew Patron Items	⌘R
Broadcast message to clients	
Display all connected clients	
Advanced Bookings	
Process pending bookings	

## Patron Holds

## Removing Patron Holds

To remove a patron hold, select **Patron Holds** from the **Circulation** menu. Alternately, you can click the **Holds** tab on the **Circulation** window and then click on the **Patron Holds Queue** or **In-Stock Patron Hold** buttons. Removal of all current patron hold requests is done from these two fields.



To remove a patron hold request, select (highlight) the hold you want to remove from the **Patron Hold Queue** or **In-Stock Patron Holds** fields and click **Remove**. The hold will vanish from the window and be permanently deleted.

**W A R N I N G !**

When you remove a hold request, you cannot undo it. The only way to restore an incorrectly removed hold is to place a new hold for the patron.

## Circulation

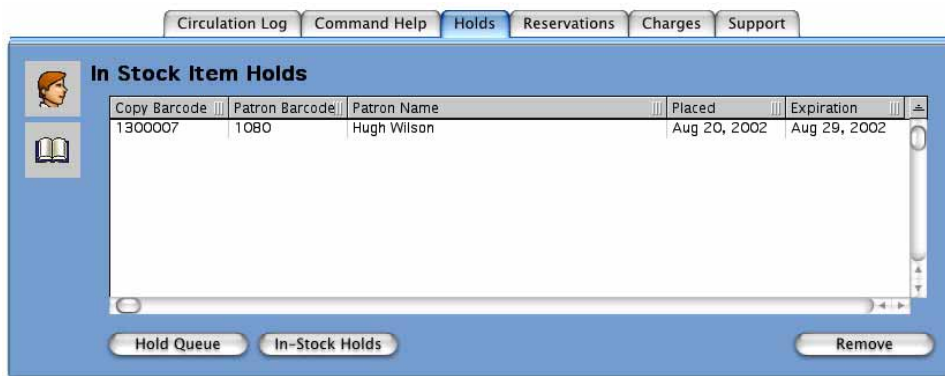
Start Bookdrop	⌘1
Make Charges/Payments	⌘2
Show Patron Details	⌘3
Patron Holds	⌘4
Patron Reservations	⌘5
Show Item Details	⌘6
Adjust Item Holds	⌘7
Remove Copy Reservations	⌘8
Renew Patron Items	⌘R
Broadcast message to clients	
Display all connected clients	
Advanced Bookings	
Process pending bookings	

## Item Holds

The **Item Holds** tabs shows items that are checked out, but have holds placed on them by other patrons.

## Adjusting or Removing Item Holds

To adjust or remove hold requests for the current item, you can either use the **Adjust Item Holds** option from the **Circulation** menu. Alternately, you can click the **Holds** tab on the **Circulation** window and then click on the **Item Holds Queue** or **In-Stock Item Hold** buttons. Removal of all current item hold requests is done from these two fields.



To remove a item hold request, select (highlight) the item hold you want to remove from the **Item Hold Queue** or **In-Stock Item Holds** fields and click **Remove**. The hold will vanish from the window and be permanently deleted.

To change the order of the hold requests in the **Item Hold Queue**, click on a patron name and drag their selection up or down. To keep your changes, click **Save**. To discard any changes, click the **Cancel** button.

## Reservations

Use reservations when patrons want to check out items from the library for specified future dates. When patrons have item reservations, they are only available for checkout by the requesting patron during their specified dates. If another patron tries to check out an item during its reservation period, Alexandria rejects the request or adjusts the date range to accommodate the reservation.

### - N O T E -

Reservations differ from hold requests. A reservation checks out a specific copy in advance for a particular time. A hold request puts your name in a hold queue (a waiting list) to check out an item when it becomes available.

Reservations are shown on patron and item status reports. Unlike hold requests, reservations are placed on *specific* copies. If you have multiple copies of an item, you must place the reservation on *one* copy. Alexandria will automatically remove expired reservations.

Patrons can have unlimited numbers of reservations. Your circulation policies determine the maximum number of days allowed for a copy reservation (see “Circulation Policies” on page 149). To deactivate reservations, set the maximum number of days to “zero”.

When making reservations using the calendar, you can also select more than one set of dates for new reservations. If these new reservations (or their buffer days) touch, then they are combined into one reservation.

You can also use reservations with the **For Library Use** patron (**barcode 3**) to ensure that an item is available for use in the library during a specified date range. For example, you can use the **For Library Use** patron to make reservations for all Thanksgiving books on November 15th through the 30th. No other patrons can check out Thanksgiving books while those reservation dates are active.

## Placing a Reservation

**Command:**    G {item barcode}

**Place a Reservation**—Current patron places a reservation on an item or activates **Reservation** mode.

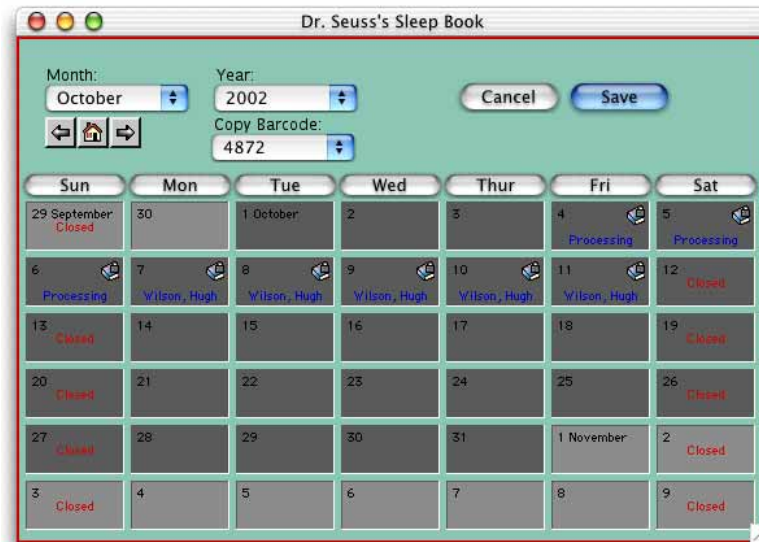
- To place a reservation on an item (if you have a current patron), type “G” and then type (or scan) the barcode of the item; press <enter>.

If you do not know the item’s barcode number, locate it using one of the find commands (see “Locating Patrons and Items” on page 270).

- To activate **Reservation** mode, type “G” and press <enter>. A reservation for the current patron is placed on every item whose barcode you type (or scan) while in this mode. To exit **Reservation** mode, enter a patron’s barcode number or use the “X” or “.” command.



When you enter the “G” command, Alexandria opens a calendar for you to mark the days you want reservations placed on (for the current patron). The calendar will show the current month.



You cannot make reservations on days marked with the icon of a lock. Here's how the calendar will mark days:

- Days that the library is closed show the word **Closed** in red. In the example above, the library is closed on Saturdays and Sundays.
- Days that have existing reservations are marked with a locked book icon. The barcode number or name of the patron who currently has the item reserved for that day is shown in red. Items that are checked out or have in-stock holds placed on them are also shown in red. You may select different months or days or select another copy of the title (if available) from the drop-down menu in the upper left-hand side of the calendar. New reservations will be shown as blue.
- If the item you are trying to place a reservation on is currently overdue, it will be shown as red in the middle of the calendar day and prefaced with an asterisk. Only the days after the item was due back will be marked overdue.



#### NOTE:

Make sure the reservation dates are correct before you **Save**. They cannot be changed later. To change dates, you must delete the incorrect reservation and place the correct one.

To make a reservation for the current patron, click on the day (or click and drag across multiple days) for which you'd like to reserve the item. Days you select will be marked with the patron's barcode number or name in blue. To omit a day you have mistakenly selected, click on it again.

You can select any available days as long as you don't exceed the number of days allowed in your circulation policies for patron and item. If preferences allow, you can select closed days to start and end reservations on.

When you have selected your reservation days, click **Save**. You can make more than one reservation on the calendar for single or multiple copies.

Use the **Cancel** button if you want to exit the window without placing a reservation.

To print reports for copies with reservations, select **Circulation Reports** from the **Reports** menu and choose the **Reservations** report. Using the selection options, you can specify which reservations to print.



## Reservation on Any Copy

**Command:** GA {copy barcode} {begin date} {end date}

**Reservation on Any Copy**—Use this command to place a reservation on any available copy of the current title. If you have a current item on the **Circulation** window, you may alternately use a “=” in place of the current copy’s barcode number. If you do not specify a begin date, Alexandria will use a date close to the current date. If you do not specify an end date Alexandria will calculate a date based on the specified copy’s policy.

## Reservation on Specific Copy

**Command:** GB {copy barcode} {begin date} {end date}

**Reservation on Specific Copy**—Use this command to place a reservation on the **Circulation** window’s current item. If you have a current item on the **Circulation** window, you may alternately use a “=” in place of the current copy’s barcode number. If you do not specify a begin date, Alexandria will use a date close to the current date. If you do not specify an end date Alexandria will calculate a date based on the specified copy’s policy

## Reservation by Patron

**Command:** GP {patron barcode}

**Reservation by Patron**—Use the “GP” command to place reservations on a current item for several different patrons. The current item won’t be cleared and each command you enter will bring up the **Reservations** window. This command is useful when you have a popular item that many patrons want to place a reservation on (e.g. the newest *Harry Potter* book).

## Reservations Check Out, by Item

**Command:** GG {item barcode}

**Reservations Check Out by Item**—Use the “GG” command to check out items that have reservations *close to* the current date. In this mode, all you need to do is scan the barcodes of the reservation copies. If there is a pending reservation, Alexandria will issue the item to the correct patron. The *close to* preference is **Days to look ahead when checking in reservations** in your **Circulation** preferences.

## Reservations check out, by Patron

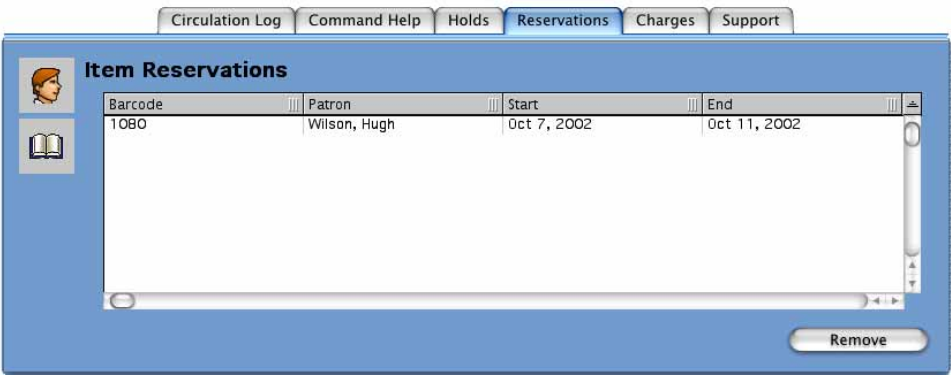
**Command:** GPP {patron barcode}

**Reservations Check Out by Patron**—The “GPP” command takes a patron barcode and attempts to find pending reservations that begin *close to* the current date. If a reservation is found, it’s checked out to the current patron. The *close to* preference is **Days to look ahead when checking in reservations** in **Circulation** preferences.

Circulation		
Start Bookdrop		⌘1
Make Charges/Payments		⌘2
Show Patron Details		⌘3
Patron Holds		⌘4
Patron Reservations		⌘5
Show Item Details		⌘6
Adjust Item Holds		⌘7
Remove Copy Reservations		⌘8
Renew Patron Items		⌘R
Broadcast message to clients		
Display all connected clients		
Advanced Bookings		
Process pending bookings		

## Removing Patron Reservations

Use **Patron Reservations** from the **Circulation** menu to remove reservations for the current patron. A list of reservations for the current patron will be shown.



To remove a reservation, select (highlight) the line you want to remove and click **Remove**.

### W A R N I N G !

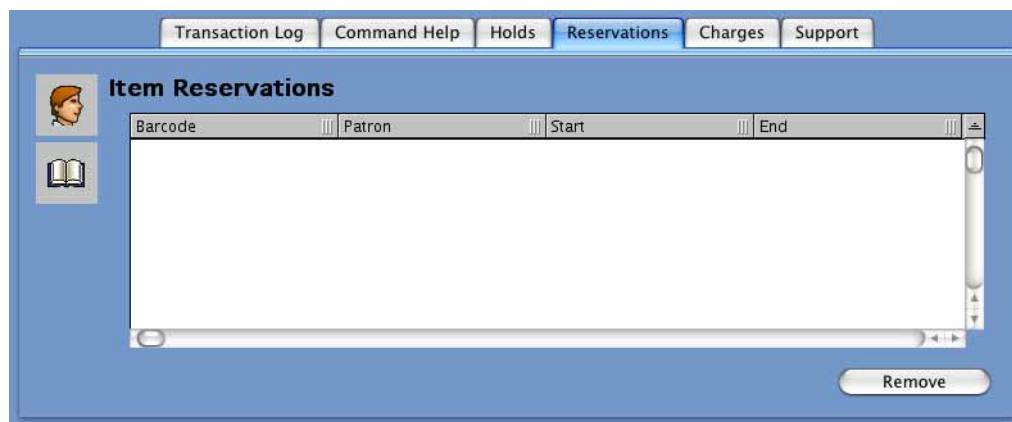
You cannot undo a remove you made to reservation in this window. The only way to restore a reservation that was incorrectly removed is to place a new reservation for the patron.

## Circulation

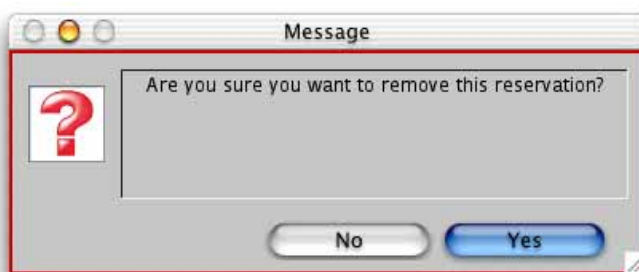
Start Bookdrop	⌘1
Make Charges/Payments	⌘2
Show Patron Details	⌘3
Patron Holds	⌘4
Patron Reservations	⌘5
Show Item Details	⌘6
Adjust Item Holds	⌘7
Remove Copy Reservations	⌘8
Renew Patron Items	⌘R
Broadcast message to clients	
Display all connected clients	
Advanced Bookings	
Process pending bookings	

## Removing Copy Reservations

Use **Remove Copy Reservations** from the **Circulation** menu to remove reservations for the current item. A list of patrons who have reservations for this copy will be shown.



To remove a reservation, select the line you want to remove and click **Remove**.



You will be asked if you are sure that you want to remove the reservation. Click **Yes** or **No**.



## Handling Charges, Payments, and Refunds



Use the **Charges**, **Payments**, and **Refunds** tab on the **Circulation** window to view charges assigned to a patron for overdue items or fees assigned for special circumstances (such as lost items or loan fees). Alexandria calculates the amounts for overdue charges and fees based on your circulation policies.

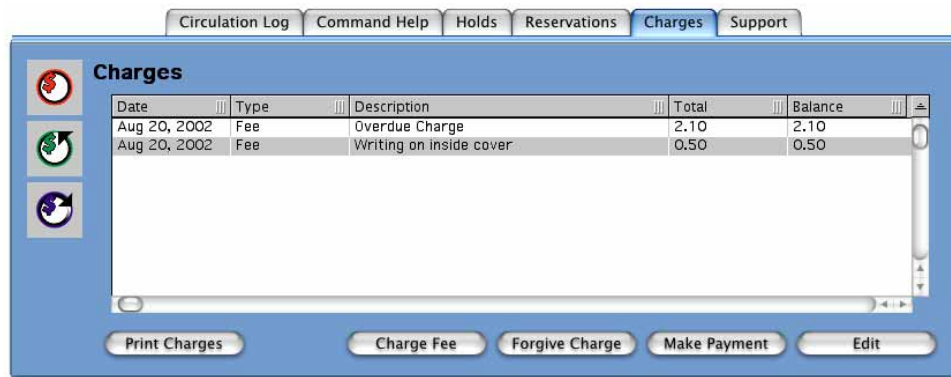


You can also use the **Charges**, **Payments**, and **Refunds** tab to charge miscellaneous fees to a patron, record the payments a patron makes, or amounts you have forgiven.

## Fee Charges, Payments, and Refunds

**Command:** F

**Fee Charges and Payments**—To view charges and payments for the current patron, type “F” and press <enter>, or choose **Make Charges/Payments** from the **Circulation** menu. These commands will open the **Charges** tab of the **Circulation** window (shown below):



This tab window has three modes: **Charges**, **Payments**, and **Refunds**. You can access these different modes by clicking on the three colored icons listed vertically to the left of the charges field.



### NOTE:

To charge a patron for a damaged book after it has been checked in, use the “F {book amount} {description}” command in Circulation window with a Current Patron. For example, if Patron 1621 bookdropped a damaged item, the librarian can later enter Patron 1621 into the Circulation window and assess them a fee by typing “F 20.00 Charles scribbled in index” into the command line to charge them a \$20.00 fee.

The **Charges** tab shows the charges currently assessed against the patron. Alexandria currently uses the following charge types.

- **Overdue**—Charges for overdue books that are still checked out. These charges are updated daily because the charge amount increases each additional day the book is overdue. You can enter a payment against this kind of charge without checking the book in.
- **Fee**—Charges for overdue books that have been returned, loan fees specified in your circulation policies, or any additional charge such as reading club membership, damage to library books, etc.
- **Lost**—Charges for losing a library book.

The **Payments** tab shows the total payments received from this patron.

The **Refunds** tab shows the total refunds received by this patron.

The **Charges**, **Payments**, and **Refunds** modes share some similar functionality. For instance, each mode has the ability to **Print** detailed lists of totals for *all* charges, payments, and refunds for the current patron; this includes the ability to **Print Receipts**. Each mode also has an **Edit** button, which opens the **Edit Fee** window, allowing you to change charge, payment, or refund fee amounts and descriptions (see “Edit A Fee” on page 244).

## Charging a Fee

**Command:** F {charge amount} {comment}

**Charging a Fee**—Use the “F” command with an amount and optional comment to issue a charge against the current patron. For example, to assign a \$4.50 charge for a library Reading Club membership, type “F4.50 Reading Club” and press <enter>.

## Charging a Fee

You may charge a fee to the current patron by clicking on the **Charge Fee** button. When you click the **Charge Fee** button, the following window appears:



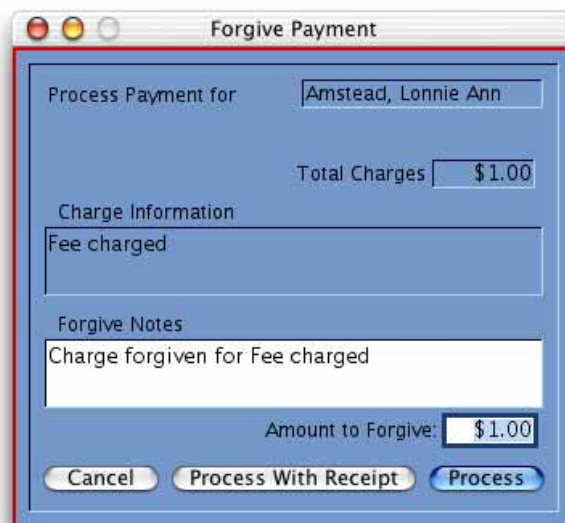
Use the following steps to forgive a charge or a portion of the charge

- Step 1. Enter a **Fee Comment**, **Fee Amount**, and optional **Payment**.
- Step 2. When you are satisfied with the fee you have charged, click the **OK** or **Charge Fee/Print Receipt** button to charge the fee (make the optional payment) and print a physical receipt. These receipts can either be given to the patron at time of charge or filed by the library for safekeeping. If you are not satisfied with the your charge, click **Cancel**.

Once you enter a charge, you can change it if you made a mistake. In the **Charges** tab of the **Circulation** window, select the charge to change and click on the **Edit** button. You can modify either the **Fee Comment** or the **Fee Amount** (except on overdue fees which are still accruing). Editing fees is further detailed on page 244.

### Forgiving a Charge

Use the following steps to forgive a charge or a portion of the charge. Please keep in mind that, although you may have only chosen *one* fee to forgive, the **Total Charges** amount will be a total of all the current patron's fees.



Forgive Payment

Process Payment for: Amstead, Lonnie Ann

Total Charges: \$1.00

Charge Information

Fee charged

Forgive Notes

Charge forgiven for Fee charged

Amount to Forgive: \$1.00

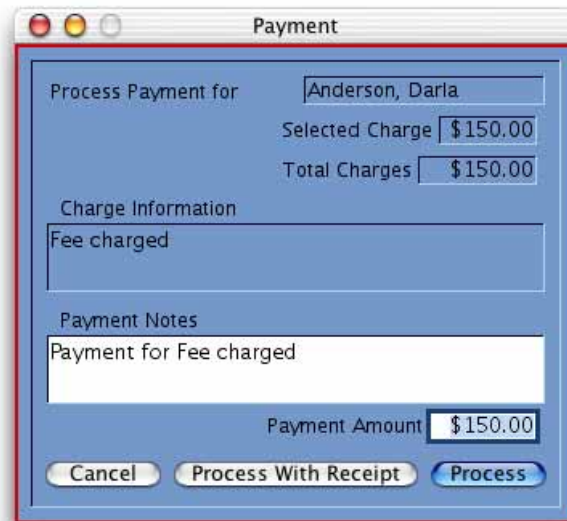
Buttons: Cancel, Process With Receipt, Process

- Step 1. To forgive a charge, select (highlight) the charge description from the **Charges** tab in the **Circulation** window and click the **Forgive Charge** button.
- Step 2. The above window will appear. Enter the dollar amount in the **Amount to Forgive** field. You can forgive the entire charge, or a portion of the charge.
- Step 3. In the **Forgive Notes** field, you may want to enter a note explaining why you forgave the payment.

## Making a Payment

Use the following steps to process a payment or pay a portion of the charge.

- Step 1. Select the line and click the **Make Payment** button. The **Payment** window appears.

A screenshot of a software window titled "Payment". The window has a blue background and a red border. It contains several fields and buttons. At the top, there are three colored window control buttons (red, yellow, green). Below them, the text "Process Payment for" is followed by a text box containing "Anderson, Darla". To the right of this, "Selected Charge" is followed by a text box containing "\$150.00". Below that, "Total Charges" is followed by a text box containing "\$150.00". There is a section titled "Charge Information" with a text box below it containing "Fee charged". Below that is a section titled "Payment Notes" with a larger text box containing "Payment for Fee charged". At the bottom right, "Payment Amount" is followed by a text box containing "\$150.00". At the very bottom, there are three buttons: "Cancel", "Process With Receipt", and "Process".

- Step 2. In the **Payment Notes** field, enter notes concerning the payment. Perhaps if, for some reason, you reduced the charge (by modifying the **Total Charges** value), you would want to enter this information.
- Step 3. Enter the amount the patron is paying in the **Payment Amount** field.
- Step 4. Click **Process With Receipt** to record the payment and print a patron friendly receipt.
- Step 5. Click **Process** to record the payment or **Cancel** to stop.

### Edit A Fee

Use the following steps to edit the total cost of a fee and change its description.



- Step 1. To edit a fee, select (highlight) the charge description from the **Charges** tab in the **Circulation** window and double-click on it (or click the **Edit** button).
- Step 2. The above window will appear. Change the dollar amount in the **Total** field. You can also edit the fee description that appears in the **Charges** tab of the **Circulation** window.

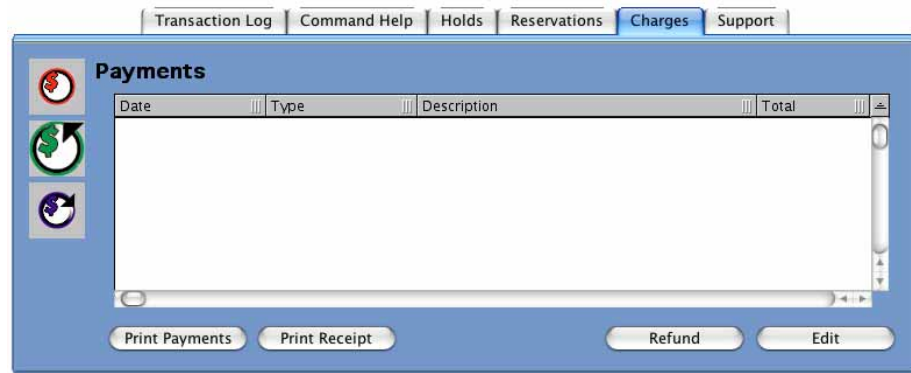


## Payments

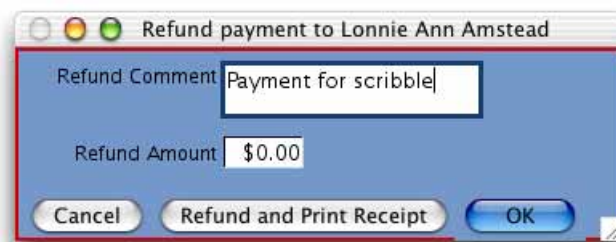
The **Payments** mode of the **Charges** tab will list all payments that the current patron has made on various charges and fees. You also use the **Payments** mode of the **Charges** tab to refund payments to patrons.

### Refunding A Payment

Use the following steps to refund a payment or refund a portion of the payment.



- Step 1. To refund a payment, select (highlight) the payment description from the **Payments** mode of the **Charges** tab in the **Circulation** window and click the **Refund** button.
- Step 2. The window below will appear. Enter the amount to refund in the **Refund Amount** field. You can also enter a comment in the **Refund Comment** field, explaining why you are performing a refund to the current patron.



- Step 3. When you are satisfied with your refund, click **OK** to process the refund, or click **Refund and Print Receipt** to refund the payment and print a physical receipt. These receipts can either be given to the patron at time or refund or filed by the library for safekeeping. If you are not satisfied with the your refund, click **Cancel**.

## Refunds

The **Refunds** mode of the **Charges** tab will list all refunds made to the current patron. You also use the **Refunds** mode of the **Charges** tab to edit refund descriptions.

The screenshot shows a software window titled "Refunds" with a blue border. At the top, there is a tabbed interface with the following tabs: "Transaction Log", "Command Help", "Holds", "Reservations", "Charges" (which is selected and highlighted in blue), and "Support". On the left side of the window, there is a vertical toolbar with three icons: a red circle with a white dollar sign, a green circle with a white arrow, and a blue circle with a white arrow. The main area of the window contains a table with the following headers: "Date", "Type", "Description", and "Total". The table is currently empty. At the bottom of the window, there are three buttons: "Print Refunds", "Print Receipt", and "Edit".

Date	Type	Description	Total
------	------	-------------	-------

## Support

The **Support** tab of the Circulation window has three modes: **Email Tech Support**, **System Information**, and **FTP**. You can toggle between these modes by clicking on the buttons aligned vertically on the left-hand side of the **Support** tab.

## Email Tech Support

If you have an open connection to the internet, you can use the **Email Tech Support** mode to send questions to COMPanion's Technical Support team. Include a title in the **Subject** field and describe the nature of the problem you need help with or a question you need answered in the **Email Message** field.



If you would like to send an email to a division of COMPanion Corporation other than Technical Support, use the **Send Email To** drop-down menu (located to the right of the **Subject** field) to select the location where you would like your email sent. For example, if you happen across a program exception while using Alexandria, you can report the bug directly to COMPanion's Quality Assurance department by selecting **Bugs** from the Tech Support drop-down menu. Additionally, if you come across a passage in this (or any other) COMPanion user's manual that seems too convoluted to understand, you can select **Documentation** from the **Send Email To** drop-down menu to deliver your questions or concerns to COMPanion's Technical Writer.

You can add attachments to send along with your email message by clicking the **Attachments** button. This will open an **Email Attachments** window. All you need to do is point Alexandria in the direction of your file (or files) using the add and remove attachment buttons. The red number to the right of the **Send Email To** drop-down menu indicates the number of attachments you have affixed to the email.

When you are ready, click **Send** to email the notice to the party you have specified in the **Send Email To** drop-down menu.



If you haven't entered an email address in your **Library Information** preference window (see *"Library Information Tab"* on page 127), you will not be able to send email to the Technical Support team.

Alexandria won't check to see if your email address is valid, so any address that seems legitimate will be accepted. If you are using this technique to fool Alexandria, don't forget to explain why in your message and provide correct return contact information—otherwise, Technical Support will respond to your fabricated email address and you won't receive the help you need.

## System Info

This tab contains information about your system. This information is automatically attached to your email messages so that our Technical Support team has all the basic information possible to help solve your problems and questions.

The screenshot shows the 'System Info' tab selected in a navigation bar. The main content area is divided into two panes. The left pane contains a list of system statistics, and the right pane contains 'Alexandria DS Information'.

System Statistics	
Patron .....	126
Item Titles .....	2566
Item Copies .....	2656
Transactions .....	4
Usage Statistics .....	4
Patron Policies .....	2
Item Policies .....	13
Circulation Policies .....	0
Orders .....	1
Vendors .....	1
Budgets .....	1
Subscriptions .....	1
Routes .....	1

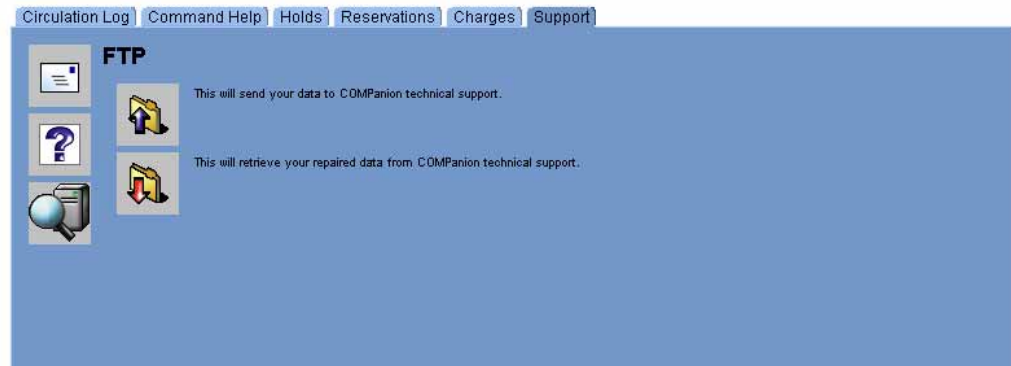
**Alexandria DS Information:**

Version: 5.4.4  
Library Name:  
Product Codes:  
  
Serial Number:  
Validation Code:

**Refresh**

## FTP

The **FTP** mode allows users to **Send** or **Get** data from COMPanion's FTP site. The **Send** and **Get** buttons should only be used when COMPanion's Technical Support team requests a copy of your data or informs you that your repaired data is available for download. Tech Support will supply you with the authorization number that is required for entry when either the **Send** or **Get** data icons are selected.



**Send Data**—Sends your Alexandria data to the COMPanion's FTP site for Technical Support to review and (in case of problems) repair or modify.

**Get Data**—Used to retrieve repaired or modified data from COMPanion's FTP site.

Circulation	
Start Bookdrop	⌘1
Make Charges/Payments	⌘2
Show Patron Details	⌘3
Patron Holds	⌘4
Patron Reservations	⌘5
Show Item Details	⌘6
Adjust Item Holds	⌘7
Remove Copy Reservations	⌘8
Renew Patron Items	⌘R
Broadcast message to clients	
Display all connected clients	
Advanced Bookings	
Process pending bookings	

## Using the Circulation Menu

Additional circulation commands are available from the **Circulation** menu. This menu appears at the top right of the menu bar across the **Circulation** window. You can either select a command directly from this menu or use the hot-keys (shown on the right-hand side of the menu) to execute commands.

Some of the commands in this menu require a current patron or current item. For example, you must have a current patron to select **Show Patron Status**.

The **Circulation** menu shows available commands in bold text. For example, if the current patron does not have any holds or reservations, the **Remove Patron Holds** and **Remove Patron Reservations** selections are grayed-out in the menu and therefore, non-selectable.

The following commands are available in the **Circulation** menu.

**Start Bookdrop**—Sets the current mode to **Bookdrop**. In **Bookdrop** mode, you enter barcodes for items you want to check in. This option will toggle between **Start Bookdrop** and **Start Check In/Out** mode.

**Start Check In/Out**—Sets the current mode to **Check In/Out**. This menu will toggle between **Start Bookdrop** and **Start Check In/Out** modes.

**Make Charges/Payments**—Add or remove fines, accept payments for fines incurred, and issue refunds for payments made. You must have a current patron to select this item.

**Show Patron Details**—Shows the complete details of the current patron; including all transactions, fines, requests, and so forth. You must have a current patron to select this option. Performs the same function as the **Details** icon.

**Patron Holds**—Opens the **Holds** tab on the **Circulation** window and shows the items the current patron has on hold. You must have a current patron with hold requests to select this item (*see “Holds” on page 232*).

**Patron Reservations**—Opens the **Reservations** tab on the **Circulation** window and shows items with reservations pending for the current patron. You must have a current patron with reservations to select this item (*see “Reservations” on page 235*).

**Show Item Details**—Shows the complete details of the current item, including the status for all copies of that title. You must have a current item to select this command. Performs the same function as the **Details** icon.

**Adjust Item Holds**—Shows all patrons who have hold requests for the current item. You can remove a request from the queue or change its order. You must have a current item with hold requests displayed to select this item.

**Remove Copy Reservations**—Shows all forward reservations for the current item. To remove reservation requests, click on the reservation and click on **Remove Reservation**. You must have a current item with reservations to select this item.

**Renew Patron Items**—Shows everything currently checked out to the current patron. Either click on the **Renew All** button to renew all items or highlight certain items to renew and click the **Renew** button. The current patron must have items checked out.

**Broadcast Message to Clients**—A query window will appear with a text box for entering and sending messages to other Librarian and Researcher Workstations connected to the Data Station. This message will only appear to currently-connected clients.

**Display All Connected Clients**—Lists, in the transaction log all the Librarian and Researcher Workstations that are currently connected to your Data Station. The type of client and the machines' IP address are visible in the log.

## Checking Items Out and In

Alexandria makes it easy to check items in and out. Alexandria automatically determines whether a barcode you enter belongs to a patron or an item and whether that item is already checked out. Because of this, Alexandria can usually determine the appropriate course of action.

In addition, while you are performing transactions, Alexandria automatically computes due dates, adjusts for closed dates, verifies policies, and collects statistics.

The subsequent sections provide the steps for checking in and out. Other sections in this chapter will describe special kinds of checkouts, such as: same-day check outs, temporary items, renewing, reserving, and making reservations. They also cover “special status” items such as lost, archived, and on order.

### - N O T E -

You can use the equal sign instead of the barcode for the Current Item in *any* command. For example, if the Current Item is 3000, then “H=” is the same command as H3000.

## Checking Items Out

Use the following steps to check an item out.

- Step 1. Type or scan the barcode of the patron who is checking an item out. This makes the patron current.

If you do not know the patron’s barcode, use the locate command (see “*Locating Patrons and Items*” on page 270) to find the patron and their barcode.

- Step 2. Alexandria uses the item due date established in your **Circulation Policies**. To enter a different due date, use the **Set Override Date** command (see “*Set Override Due Date*” on page 263).

As you check items out, the item details appear on the **Circulation** window.

A line is also added to the transaction log to show what items have been checked out.

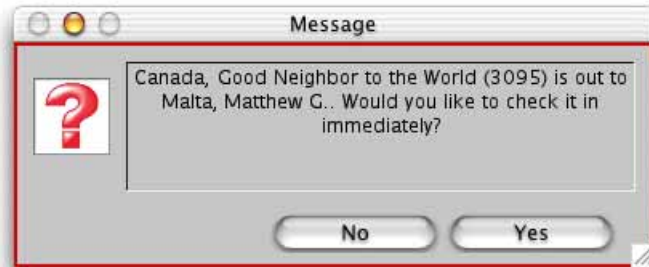
- Step 3. Type or scan the barcode for the item you want to check out to the current patron.



## Special Conditions When Checking Out Items

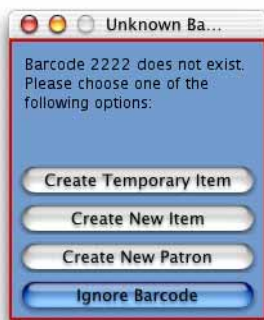
When you are checking items out, Alexandria will alert you to special conditions that may affect checkout.

- If you enter a barcode for a book that is already checked out, a warning message will appear.



You can choose to check this book in, or cancel the request to check it out.

- If checking an item out to a patron violates a set policy, Alexandria will alert you. For example, if a patron exceeds the number of items they can check out or exceeds the overdue limit, a warning message will appear. If more than one policy setting is violated, the messages will appear in a single window.



If you have the authority to override policies, the window will include the **Override and check this item out anyway?** option. You can allow the patron to check the item out (even though it exceeds the specified limit) or cancel their request to check it out. If you don't have the authority to override policies, a warning message will appear, and you are left without the ability to override and check out the item to the patron.

If you decide to check the item in and then choose not to **Override** the policy problem, the item will still be checked in.

If the item barcode you enter is not assigned to an existing item (and is not in the temporary barcode range defined in your preferences), the **Unknown Barcode** window appears.

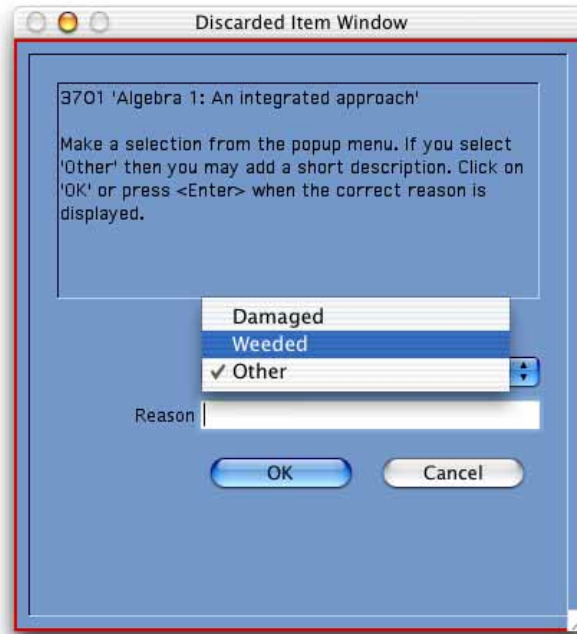
You can choose **Ignore Barcode** if you entered it incorrectly, or you can select one of the other options.

If a copy is designated as an in-stock hold for another patron, an error message will appear. If you have the authority, **Cancel** / **Override** buttons will appear at the bottom of the window. Clicking **Override** will check the copy out to the current patron with the in-stock hold back to the top of the hold queue. If you don't have any authority, no override options will be available and item checkout will be denied.



## Checking Items Out To the Discarded Items Special Patron

When checking an item out to the **Discarded Items** Special Patron (see page 257 for more information on *Special Patrons*) you are allowed to specify a reason for the item's inevitable disposal.



You may choose from three different options from the drop-down menu of the **Discarded Item Window**. Click **OK** or press <enter> when the correct reason for item disposal is selected.

**Damaged**—If the damaged item *is not* checked out to a patron, you may check it out to the **Discarded Items** patron (Special Patron #2) with the **Reason** as **Damaged**. Nothing will happen to the item other than it is marked as "Discarded-Damaged". This is similar to declaring an item lost that was not checked out to a patron.

However, if the damaged item *is* checked out to a patron and is then checked out to the **Discarded Items** patron without being checked in first, then the **Discarded Items Window** will change to display the item's **Replacement Cost** and allow the user to charge a fine to the patron who last borrowed the book (and presumably damaged it). Clicking on **Charge Fine and Print Receipt** or **Charge Fine** will charge a fine to the destructive patron and places a note in the transaction log. However, you may also choose **Forgive Fine** if you do not wish to charge the offending patron for the replacement cost.

**Weeded**—If your library is removing a certain book (or series of books), this option will check books out to the **Discarded Items** Special Patron and apply the disposal reason as "weeded".

**Other**—Selecting this option allows you to add a short piece of descriptive text that specifies the reason for the item's removal.

These reasons for removal will be displayed when you select **Discarded Items** as your report **Format** when running the **Special Items Lists Circulation Report** (see page 431 for more information on *Circulation Reports*).

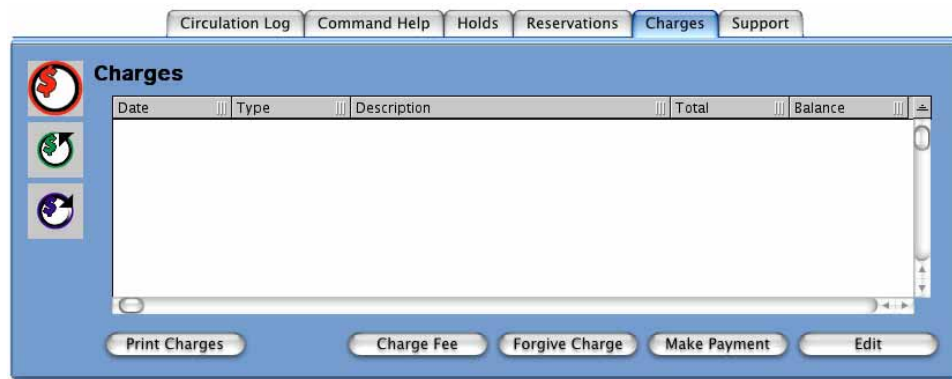
## Checking Items In

Use the following steps to check in items:

- Step 1. Type or scan the barcode of the patron who has the item checked out. This makes that patron the current patron.  
If you do not know the patron's barcode, use the locate command (see *"Locating Patrons and Items"* on page 270) to find the patron's barcode.
- Step 2. Type or scan the barcode of the item you are checking in.

If you are checking-in a number of items, use the **Bookdrop** mode described on the next page.

If the item you check in is overdue and contains a fine, the **Overdue Fine** window appears with information about the fine.



From the **Charges** tab you can enter a payment, forgive a fine, forgive a portion of a fine, or record a fine to the patron's permanent record to be processed later. If you want to forgive part (or the entire amount) of the fine, enter a value in the **Amount to Forgive** field in the **Forgive Payment** window, accessed by clicking on the **Forgive Charge** button. If you want to charge an additional amount, double-click on a fee description listed on the **Charges** field to open the **Edit Fee** window; you may then enter an edited value in the **Total** field. To record a payment, click the **Payment** button to open the **Payment** window; you may then enter a total in the **Payment Amount** field.

To charge a fine, click on the **Charge Fee** button (see *"Fee Charges, Payments, and Refunds"* on page 240).

## Temporary Items

You can use Alexandria's temporary item checkout function to keep track of items in your library that are borrowed, but you don't want entered as part of your permanent inventory. For example, you may want to keep track of when newspapers, brochures, magazines, and other items are borrowed and returned, but not inventory them because of their limited shelf life.

A temporary item is logged at checkout and check in the same as any other item. Temporary items may be renewed and have fines charged against them. However, once the item is checked in, the transaction record and temporary item information is removed from Alexandria without a trace.

While they are checked out, temporary items show on loaned item reports, overdue lists, fine lists, and lost item lists. Because they are not inventoried, they do not show on inventory reports or shelf list reports. A temporary item cannot be searched using the catalog. If these items circulate frequently, it may be better to catalog them in **Items Management**; otherwise they will need to be re-entered each time they circulate.

## Setting Up Temporary Check Out Items

See page 109 for information on setting up temporary default barcodes.

## Checking Out Using Temporary Items

There are a number of ways to checkout temporary items.

You can prepare several temporary checkout cards with temporary barcode numbers established in your preferences. When a temporary item is going to be checked out, attach one of these cards. When the item is returned, remove the card and return it to a stack of temporary checkout cards to be reused again for other temporary items.

Another way to use temporary checkout is to place a temporary barcode (within the range specified in your preferences) on all temporary items that might be checked out. The barcode is then used only for that item, but never permanently entered into Alexandria. For example, as newspapers are received, you put a temporary barcode number on the newspapers.

### - N O T E -

You can print temporary barcode labels using Alexandria. Choose **Special Reports** from the **Reports** menu, then select **Custom Barcode Labels**.

## Same Day Check Outs

See page 274 for information on checking out items that are due same day.

When you enter a temporary barcode number in the command line, Alexandria checks the following:

- Alexandria checks to see if the number is being used by an existing item.
- If it is not being used, Alexandria checks to see if the number is being used by an existing patron.
- If it is not being used by an existing patron, Alexandria checks to see if the number is within the range determined for temporary items in **Circulation** preferences (*on page 109*). If the number is well within range, the following window appears:



The screenshot shows a window titled "Temporary Item". Inside the window, there are several text input fields. The first field is labeled "Patron:" and contains the text "Hugh Wilson". The second field is labeled "Item:" and contains the text "546112". Below this is a larger text area, also labeled "Item:", which contains the text "546112". Further down is a field labeled "Description:" which contains the text "Sports Illustrated, Sept. 03, 2003". Below the description field is a field labeled "Due Date:" which is currently empty. At the bottom right of the window are two buttons: "Cancel" and "Save".

Follow these steps to check out the temporary items.

- Step 1. Enter a description of the item in the **Description** box.
- Step 2. If you want to specify a due date, enter it in the **Due Date** field. If you do not enter a due date, Alexandria computes a due date based on the policies you have assigned for temporary items.
- Step 3. Click **Save**.

## Special Patrons

There are several “special patrons” that Alexandria creates. You can use these patrons to track items with a special status of lost, archived, or out-for-repair. For example, to track items that have been lost, you can check them out to the **Lost Patron**, (barcode #1).

Special patrons use the **System** policy, which has no restriction on the number of items that may be checked out at one time. You can check items out to special patrons just as you would with any other patron.

Here are Alexandria’s “special” patrons:

**Lost Items (barcode 1)**—To keep track of items that have been lost, check them out to this patron. Unlike other items, an item that is checked out to the **Lost Item** patron does not have its inventory date renewed. If the item is ever found, simply check it in and it’s available for checkout again.

If the item is already checked out to real patron, when you check it out to the **Lost Item** patron, a window appears so you can charge a fine to the patron who has lost the item. The lost item will appear on the patron’s status report.

Although you may permanently remove an item from the Alexandria system when it’s lost, lost items are quite often found again later. Checking an item out to the **Lost Item** patron makes it easier to return it to the system because you simply check the item back in when it’s found.

Using the **Lost Item** patron also makes it easy to keep track of which items have been lost so you can order new copies.

There are **Utilities** available to remove lost items according to your policies and the criteria you select.

**Discarded Items (barcode 2)**—To track items in the library that are not to be used, but have not yet been permanently removed, check them out to this patron. To return a discarded item back to “in-stock,” simply check it in.

To permanently remove discarded items, use the corresponding **Item Utility**.

For more information on checking items out to the **Discarded Item** Special Patron, please review page 253 of this User’s Manual.

**For Library Use (barcode 3)**—To keep items available for use *only* within the library, check the items out to this patron. For example, you may want to keep holiday books available in the library and not allow them to be checked out during the holiday season. Check these items out or place a reservation on them using the **For Library Use** patron.

**On Repair (barcode 4)**—To keep track of items sent for repair and not available to patrons, check them out to this patron. When the item has been returned and repaired, check them in to make them available again.

**On Order (barcode 5)**—To keep track of items on order, permanently add the item to your collection when you order them and issue them to this patron. Enter an override date that matches the scheduled delivery date for these items. When you receive these items, check them in to make them available.

**Archived Items (barcode 6)**—To archive certain items and make them not available to patrons, check them out to this special patron. For example, issue items to this patron if they are kept in a special room and not generally available for circulation.

**Unknown Patron (barcode 8)**—Used for items with special circumstances or whose status you do not know (e.g. items on display, temporarily misplaced items that you know aren’t permanently missing).

## Reasons For Creating Your Own Special Patrons

You can create and remove your own “special” patrons to track items with a unique status as needed for your library. Use barcodes 50 or under for special patrons. These patrons are assigned the **System** policy, which does not restrict the number of items they can check out.

The following are examples of uses for special patrons you create:

- Instead of using the **Library Patron** to reserve holiday books, create a holiday patron and check out holiday books to this patron.
- Instead of using the **On Repair Patron**, create a special patron for each vendor that repairs your items. When you send an item to that vendor, check it out to them for the period of time they will have the item.
- Instead of using the **On Order Patron**, create a special patron for each vendor from whom you order items. When you order items from that vendor, check them out to that vendor and enter an override date that matches the scheduled delivery date.

## Show All Patron Notes

Command: +

**Show Patron Notes**—You may enter several different types of **Notes** for a patron under the **Notes** tab in the **Patron Management** window. When any of the **Patron Management** notes fields contain text, a **Notes** button will appear in the Current Patron area of the **Circulation** window. To view a patron's **Contact, Alert, Category,** or **General Notes**, click on the **Notes** button or enter a "+" on the command line.

## Append General Patron Note

Command: + {text}

**Append a Patron Notes**—You can add more **General Notes** to the current patrons from the **Circulation** command line rather than having to go into the **Notes** tab of the **Patron Management** window.

## Replace General Patron Note

Command: +# {text}

**Replace Patron Notes**—Use this command to completely replace the Current Patron's **General Notes** with any text that follows the command. Entering the "+#" command without any following text will clear the Current Patron's **General Notes**.

## Append Patron Alert Note

Command: ! {text}

**Append a Patron Alert Notes**—You can add more **Alert Notes** to the current patrons from the **Circulation** command line rather than having to go into the **Notes** tab of the **Patron Management** window.

## Replace Patron Alert Note

Command: !# {text}

**Replace Patron Alert Notes**—Use this command to completely replace the Current Patron's **Alert Notes** with any text that follows the command. Entering the "!" command without any following text will clear the Current Patron's **Alert Notes**.

## Show All Item/Item Copy Notes

**Command:** ++

**Show Item Copy Notes**—You can enter notes for an item copy under the **Copy Notes** tab. This tab will appear on the **Item Copy Data** window that is selected by double clicking on an item copy contained within the **Copy** section of the **Item Management** window. You can add, remove, or replace an item's **Copy Notes** or **Copy Alert Notes** from the command line of the **Circulation** window.

When notes have been entered for a copy, a **Notes** button will appear in the Current Item area of the **Circulation** window.

Enter two plus signs “++” on the command line, or click the **Notes** button to view all notes for the current item copy.

## Append Item Copy Note

**Command:** ++ {text}

**Append a Copy Note**—You can add more **Copy Notes** to the Current Item from the **Circulation** command line rather than having to go into the **Copy Notes** tab of the **Item Copy Data** window.

## Replace Item Copy Note

**Command:** ++# {text}

**Replace Copy Notes**—Use this command to completely replace the Current Item **Copy Notes** with any text that follows the command. Entering the “+#” command without any subsequent text will clear the Current Item's **Copy Notes**.

## Append Item Copy Alert Note

**Command:** !! {text}

**Append a Copy Alert Note**—You can add more **Alert Notes** to the Current Item copy from the **Circulation** command line rather than having to go into the **Copy Notes** tab of the **Item Copy Data** window.

## Replace Copy Alert Note

**Command:** !!# {text}

**Replace Copy Alert Note**—Use this command to completely replace the Current Item copy **Alert Notes** with any text that follows the command. Entering the “!!#” command without any subsequent text will clear the Current Item's **Alert Notes**.



## Print Transaction log

**Command:**   +++

**Print the Transaction Log**—The transaction log is a list of each action you have completed. This log appears at the bottom of the **Circulation** window. Use the “+++” command to print the transaction log. You can also select **Print** from the **File** menu to print the transaction log.

## Put Comment in Transaction log

**Command:**   # {comment}

**Put Comment in the Transaction log**—Use this command to put a note in the transaction log. Notes can be *very* useful for making a permanent record of special events that happen in the library. For example, enter “# Lights flickered, battery backup saved our machine!” when the power goes down. You then have a permanent record of when this event occurred. Or “# Fire Drill started.” When you return to the library, it’s clear if there has been any activity while you were gone!

## Import Script/File

**Command:**   \*

**Read Transaction File**—In addition to entering transactions by typing or scanning them into the command line, Alexandria allows users to process commands saved in text files. These text files can be created by COMPanion’s portable laser scanners or by any program that creates text files.

Use this command to select the file to read. When the file is imported, Alexandria processes the commands within it as if the user had entered them one at a time.

### - N O T E -

While processing commands via a transaction file, Alexandria does not alert you to unusual circumstances. Instead, Alexandria takes whatever action it determines the most appropriate. After reading a transaction file, be sure to check the transaction log for any possible complication alerts.

Since this function is typically used for inventory scans, Alexandria defaults all transaction files to begin with the **Inventory** command. If you are using a transaction file for purposes other than inventory, you *must* use the appropriate command in the header file.

You can also drag and drop these files onto the **Circulation** window or use the **Import** command if they have the proper file header<sup>1</sup>. Alexandria will recognize them as transaction files and process them automatically.

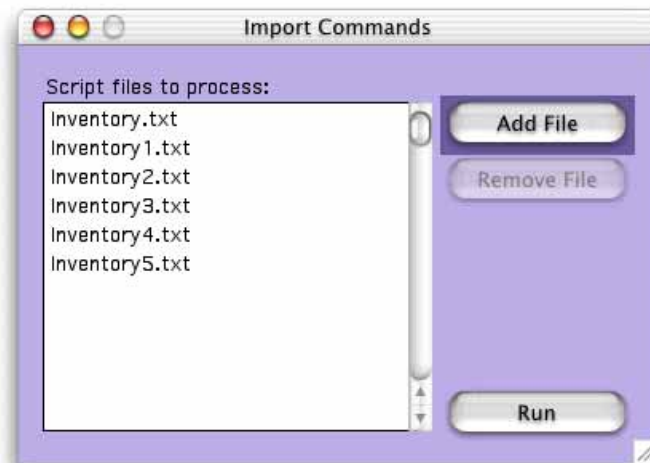
---

1. Alexandria headers begin with “###” for example, SmartScan files begin with “### SmartScan...”

## Importing Portable Laser Scanner Inventory Files

If you're using a portable laser scanner for inventory purposes and have HotSynced (downloaded) inventory data to your hard drive, use the following steps to import that data into Alexandria (*refer to your SmartScan User's Manual for more details*).

- Step 1. Make sure to backup your *current* Alexandria data.
- Step 2. Use the "\*" command followed by <enter> in the **Circulation** window to open the **Import Commands** window.
- Step 3. Use the **Add File** button to add inventory files to the **Script files to process** field. If you have downloaded several inventory files before importing them (see the example below), make sure you are renaming the files or moving them to different directories so that they do not have the same file name and do not get replaced.<sup>1</sup>
- Step 4. Once the inventory file you want imported from the **Script files to process** field is highlighted, click the **Run** button to begin import.



- Step 5. Your data is now imported into the Alexandria database.

---

<sup>1</sup> SmartScan will rename the files according to when they were downloaded, but there may be issues with some of the older portable scanners.

## Clear Override Date

**Command:** .

**Clear Override Date Mode**—Use this command to clear the **Override Date** and reset the **Circulation** window to **Check In/Out**.

## Set Override Due Date

**Command:** . {date}

**Set an Override Date**—Typically, due dates are computed based on the policies you define in **Preferences**. You can use this command to set different due dates for items you are checking out, book-dropping, showing used, or performing inventory on. For example, to set the due date to June 3, 2005, type “.Jun 3 05” (including the period) and press <enter>.

Until you clear or reset the due date using either “.” or “x”, the changes below will be performed.

- Books you check out will be due on June 3, 2005.
- When you bookdrop, the system will record the book as having been checked in on June 3, 2005.
- When you perform **Inventory**, the inventory date used will be June 3, 2005.
- When you are in **Statistics** mode, this date is used.
- The **Override Date** you set is shown on the top-right corner under the transaction log of the **Circulation** window. A transaction log entry will also show that this date was manually set.

The **Override Date** you set is in effect until you clear it. To clear the **Override Date**, type a period into the command line without a date. The “.” command will also clear any special modes (such as **Bookdrop** or **Inventory**) that were in effect. The period command “.” without a date is a quick way to prepare the **Circulation** window for **Check In/Out**.

Checking out items under an **Override Date** forces them to be due on that day, regardless if that date is **Closed** in your **Calendar Preference** (see “*Calendar Preferences*” on page 103).

## Clear Circulation Mode

**Command:** . .

**Reset Mode**—Use this command to clear any special mode in effect and reset the **Circulation** window to **Check In/Out**. This does the same thing as the period command, except that it clears the Current Patron/Item and doesn't clear the **Override Date** setting.

## Change Barcode Number

**Command:** / {old barcode=new barcode}

**Change Barcode Number**—Use this command to change barcode numbers for patrons or items in any mode within Alexandria. For example, if you are in **Check In/Out** mode, you can change item barcode numbers as you check them out. If you are performing inventory, you can change the barcodes as you inventory the items.

This command changes the old barcode number and then enters the new barcode number you specified from the command line. This means you can change barcode numbers and continue with the activities you were performing.

For example, suppose you are checking in items and come across one with barcode number 3009, but the barcode label is damaged. You can place a new barcode label on the item with the barcode number of 9000. To do this, while still in **Check In/Out** mode, type `"/3009=9000"` in the command line. Alexandria changes barcode 3009 to 9000 and enters 9000 into the command line, which will check the book in.

Please keep in mind that you cannot perform the **change barcode number** command in combination with any other commands. For instance, typing `"h/3009=9000"` in an attempt to place a hold *and* change the barcode number will be recognized as an unknown command. However, you can be in **Hold** mode and type `"/3009=9000"` in the command line to change a barcode number.

You can use this command to change patron barcodes as well as item barcodes.

## Set Self-Service Check-Out Mode

**Command:** AS

**Set Self-Service Checkout Mode**—This command logs out the user (you) and sets the mode to **Self Service Check Out**. To exit this mode and security level, select **Restart** from the **File** menu and log in under the correct security level. This command is a shortcut to change user levels, therefore, this mode can not be exited by using the “.” command.

## Set Self-Service Bookdrop Mode

**Command:** ASB

**Set Self-Service Bookdrop Mode**—This command logs out the user (you) and sets the mode to **Self Service Bookdrop**. To exit this mode and security level, select **Restart** from the **File** menu and log in under the correct security level. This command is a shortcut to change user levels, therefore, this mode can not be exited by using the “.” command.

## Bookdrop Mode

**Command:** B {optional barcode}

**Using Book-drop Mode**—Use the bookdrop command to check in items for one or for many patrons. In **Bookdrop** mode, all the item barcodes you scan (or enter) are checked in. This provides a quick way to check in a large number of books without worrying about the patrons. For example, this mode provides a quick way to check in the large number of books returned at the end of the year.

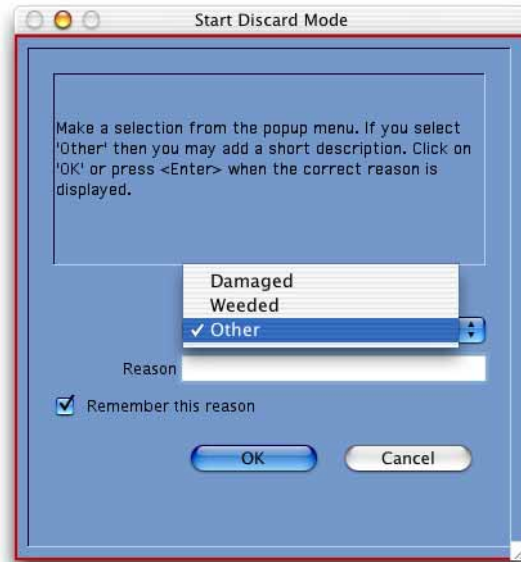
- To check in one item, type “B” followed by that item’s barcode number and press <enter>.
- To check in many items, type “B” and then press <enter>. This activates **Bookdrop** mode. You can also start **Bookdrop** mode by selecting **Start Book-drop** from the **Circulation** menu.
- While in **Bookdrop** mode, Alexandria assumes you are only checking items in. If you type or scan a barcode for an item that is not checked out, a message will appear in the transaction log. If you enter a patron barcode, Alexandria switches to **Check In/Out** mode and makes this patron the Current Patron.

## Discard Mode

**Command:** DM {optional reason}

**Discard Mode**—Use the discard command to move several items to the **Discarded Items** patron (see “*Special Patrons*” on page 257) and provide a note for each on why they are being discarded. This mode is mainly used when you are discarding several items during the same session. To discard an item (or items), type “DM” followed by an optional reason and press <enter>.

Alternately, you may just type “DM” and press <enter> and the **Start Discard Mode** window will appear, allowing you to specify the reason for discard.



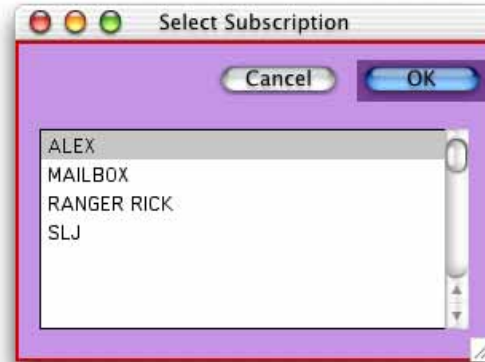
Select a reason from the drop-down menu (default is **Weeded**). If you select **Other**, a **Reason** field will appear where you may add your own, short description on why the item (or items) are being discarded. Click on the **Ok** button or press <enter> when you have selected the corresponding reason.

If you place a check mark in the **Remember this reason** box, Alexandria will remember this reason for all future discarded items. The reason that you specify will appear in the **Discarded Items** list, which is a report that can be located from under the **Circulation Report's Special Items List** (see “*Special Item Lists*” on page 431).

## Receive Subscription

**Command:** E {subscription name}

**Receive Subscription**—Use this command to document that the library has received a subscription. If the subscription name doesn't exactly match the name you used in the **Subscription** window, you'll see the **Select Subscription** window:



In this example, **ALEX** is selected.

This item is recorded as **Received** and we can see how many issues remain in the subscription by reading the transaction log. If **Inventory On Receipt** is checked in the **Subscription** window, the subscription item will be added to your inventory and assigned a barcode number.

Using the **Receive Subscription** command is the best way to record that you've received a subscription.

## Inventory Control

Use this function in Alexandria to keep track of your collection. An inventory identifies what items are contained in your library collection, which have been lost and which have been found.

Every item in your collection with a barcode number has an associated inventory date. This is the date on which you last noted that the item was located in your library.

Alexandria automatically updates the inventory date for an item when it is checked out or checked in.

The “I” command inventories but does not check in items and is good to use when items are on long-term checkout (i.e. where they may not be returned for years, but must still be inventoried and accounted for).

The “IB” command bookdrops all lost, borrowed, discarded, and other status books as they are encountered.

## Taking Inventory

**Command:** I{B} {inventory date}

**Inventory**—Use the “I” command to update the inventory date on items. You can use the current date or you can enter a different date.

- To update items with today’s date, type “I”, then <enter>. To Inventory items, scan the barcode for the item or type the barcode and press <enter>. Each item whose barcode you scan or type is updated with today’s date.
- To update items with a date other than the current date, type “I” and the date you want to use for the inventory, followed by the <enter> key. For example, to update items with an inventory date of September 1, 2005, enter “I 9/1/00”. Each item barcode you type or scan is updated with the date you specified.
- To perform an automatic bookdrop on all checked out items scanned during inventory, use the optional “B” parameter. Thus, “IB” performs inventory using today’s date. If a checked-out item is inventoried, it’s automatically bookdropped.

As you enter barcode numbers during **Inventory** mode, the transaction log records the item and call number. If a call number is out of call number order, the transaction log marks those items with an “Inv ??-->” before the call number.

To exit **Inventory** mode, use the “.” command (type a period and press <enter>).



## Notes about Inventory

- You can inventory portions of the library over a course of days. When you run inventory reports, specify the date range which you took inventory. All items inventoried during this date range will be included.

For example, if you take inventory over Spring break (April 21st through 25th), specify this date range when you run an inventory report. All items inventoried between April 21 and 25 will be included in the report. If you don't specify a date range, the reports will return all items regardless of when they were inventoried.

- You do not have to close the library to take inventory. Because the inventory date for an item is updated when the item is checked out, items checked out while you are taking inventory will have dates within the inventory date range. This is also true for items checked in during inventory.
- Items returned after you have completed inventory will automatically have their inventory date adjusted to the check in date, which will be after the inventory date. If you prepare an inventory report for all items with dates on or after the date you took inventory, these items will be included.
- To identify items missing from your collection, prepare an inventory report of non-inventoried items with the dates as when you performed inventory.
- If you are not using a portable reader when taking inventory and you enter an item barcode that Alexandria does not recognize, a window appears to let you add the new item.

Enter the title and any other desired fields and click **Save**. This provides a quick way to add the new item and continue with your inventory. You can add additional information for this item later using the **Items** window.

## Inventory Reports

You can prepare inventory reports based on the inventory date and other criteria (*see page 405 for a list of Inventory reports*). For example, you can generate an inventory report showing:

- Items inventoried or not inventoried within a specified date range.
- Lost items inventoried (which means the item is actually in the library even though it is marked as lost). This report will only work for lost items that are inventoried when using the "I" command. If you are using the **Inventory Bookdrop** command ("IB"), the status of any previously lost books will be changed from **Lost** to **Available** and therefore not appear in this report.
- Items within a specific section of your library.
- Items with a specific funding source.

## Locating Patrons and Items

Use the commands in this section to locate patrons and items for which you don't know the barcode number. For example, if you want to check out a book to a patron, but you don't have that patron's barcode, you can use the locate commands to find the patron by name.

When you enter a locate command, the **Browse** window appears starting with the patron name or item that is the closest match to the name you specified or the value you entered. When you select a patron or item from the list, they become the Current Patron or Item and appear on the **Circulation** window.

Use the up and down arrow keys on the keyboard to scroll through the list.

Double-click a name in the list or highlight (select) it and press the <enter> key. When you select a name from this window, it becomes the Current Patron and appears in the **Circulation** window.

You can enter new names in the **Browse From** field at the top of the window and press <enter> to search anew.

If your search results have more patrons than can be viewed on one window, use the **More** buttons (located at the upper right-hand side of the window) to examine additional patrons.

## Locate an Item by Call Number

**Command:** C {call number}

**Find an Item by Call Number**—Use this command to locate a copy, searching by the copy's call number. For example, to locate a title with call number 150, type "C 150" and press <enter>. The **Item Lookup** browse by window appears, starting with the item in the collection that most closely matches the call number you specified.

## Locate a Patron by Last Name

**Command:** L {patron last name}

**Locate a Patron by Name**—Use this command to locate a patron by last name and make them the Current Patron. For example, to find a patron with the last name Smith, enter "L SMITH".

## Locate a Patron by First Name

**Command:** LF {patron first name}

**Locate a Patron by Name**—Use this command to locate a patron by first name and make them the Current Patron. For example, to find a patron with the first name Darla, enter "LF DARLA".

## Locate an Item by Title

**Command:** T {title}

**Find Item by Title**—Use this command to search for an item copy by title or a portion of the title. For example, to locate an item with a title beginning with *Foundation*, type "T foundation" and press <enter>. The **Browse** window appears starting with the item in your collection that most closely matches the title you specified.

## Reserving an Item

Reserves are special types of checkouts. Use the **Reserve** command when you want to keep items available for use only within the library. You may also use the reserve function when you want specific items available for certain patrons such as teachers or department managers. For example, a teacher may want to place a number of items on reserve for students in a class. Another example would be a librarian who wants to create a special group of items temporarily available for use in the library, but not available for checkout.

An item that has been issued using the **Reserve** command has a due date in the far future, is never charged fines, and does not count as checked out. However, the system does record summary information on reserves, which is displayed in the **Patrons**, **Statistics** window and in every **Patron Transaction** report.

If you want to reserve items for a short period of time, use the **Reservations** command.

**Command:** J {item barcode}

**Reserve an Item**—Reserve an item for the current patron or to start **Reserve** mode.

- To reserve an item for the current patron, type “J” then type (or scan) the barcode number for the item that the current patron wants to reserve and press the <enter> key.

If you do not know the item barcode, use one of the find commands (<Chapter #>) to find the item and its barcode.

- To start **Reserve** mode, type “J” and press <enter>. All item barcodes you type (or scan) while in this mode are reserved for the current patron. To exit **Reserve** mode, enter a patron barcode number or use the “X” or “.” command. Reserved items can only be checked in while the patron who checked them out is the current patron and Alexandria is in **Check In/Out** mode. This makes it more difficult for a reserved book to be checked in by another patron or accidentally checked in with the **Bookdrop** command.

### - N O T E -

The **For Library Use (barcode #3)** is the *only* special patron who may place reserves on items.

## Recall Immediately

**Command:** K {item barcode}

**Issue Routing Slip**—This command issues a recall request for a specified item copy. If the item copy isn't checked out, a recall request can not be processed.

For example, the command "K 3000" will immediately recall copy 3000.

## Recall Immediately With Email Notification

**Command:** KM {item barcode}

**Recall Immediately With Email Notification**—This command issues a recall request for a specified item copy and automatically sends an email notification to the patron. If the patron in possession of the item copy does not have an email address, the recall will be processed, however, an error message will appear, notifying you that the recall notice could not be sent via email. If the item copy isn't checked out, a recall request can not be processed.

For example, the command "KM 3000" will immediately recall copy 3000 and automatically send email notification to the borrowing patron.

## Recall Immediately With Print Notification

**Command:** KP {item barcode}

**Recall Immediately With Print Notification**—This command issues a recall request for a specified item copy and a recall letter will be printed. Be sure that your printers are turned on and set up correctly in order for the recall notification letter to be printed. If the item copy isn't checked out, a recall request can not be processed.

For example, the command "KP 3000" will cause copy 3000 to be recalled and a recall letter to be printed.



### NOTE:

Since this command prints a routing slip, you should have your printer turned on when you use this command.

## Issue Routing Slip

**Command:** M [route name] [=item barcode]

**Issue Routing Slip**—This command will issue a routing slip with a given route name. Thus, the command "M STAFF=3092" will issue the **STAFF** routing slip for item **3092**. In other words, Alexandria will check out item **3092** to the responsible patron and print a **STAFF** routing slip. If you don't include an item barcode number, a TOC (Table of Contents) routing slip will be printed.

This command can be used to print a routing slip for any item in your collection. Normally, routing slips are only issued when a new subscription is received. With this command, you can print a routing slip for any item.

For example, you've been asked to route a number of items on a particular topic. You would first create a route with the appropriate people assigned. You can then locate all the items and use the **Routing Slip** command for each item.

## Change Copy Location

**Command:** NC {new location code}

**Change Copy Location**—Use this command to change the copy location code for several copies.

For example, to change a group of copies to location LibLab, type “NC LibLab” and press <enter>. This will activate **Change Copy Location** mode. You can now enter barcodes for all the copies whose location code you want to change.

The transaction log shows the copies whose location code you’ve changed.

When you have entered all the items whose location you wanted to change, use the “.” command to deactivate the **Change Copy Location** mode.

## Change Copy Shelving

**Command:** ND {new shelving code}

**Change Copy Shelving Location**—Use this command to change the copy shelving code for several copies.

For example, to change a group of copies to the shelving location Biology, type “ND Biology” and press <enter>. This will activate the **Change Shelving Location** mode. You can now enter barcodes for all the copies whose shelving code you want to change.

The transaction log shows the copies whose shelving code you’ve changed.

When you have entered all the items whose location you wanted to change, use the “.” command to deactivate the **Change Copy Shelving** mode.

## Change Copy Library

**Command:** NO {new library code}

**Change Copy Location**—Use this command to change the library code for a number of copies.

For example, to change a group of copies to library MainBranch, type “NC MainBranch” and press <enter>. This will begin **Change Copy Library** mode. You can now enter barcodes for the copies whose library code you want changed.

The transaction log shows the copies for whose library code you’ve changed.

When you have entered all the items for whose library code you wanted to change, use the “.” command to exit the **Change Copy Library** mode.

## Change Patron School

**Command:** NI

**Change Patron School**—Use this command to change the school code for several patrons.

For example, to change a group of patrons to school code `EastSide`, type “NP `EastSide`” and press <enter>. This activates **Change Patron School** mode. You can now enter all the patron barcodes whose school code you want to change.

The transaction log will record the patrons whose school code you’ve changed.

When you have entered all the patrons school code you wanted to change, use the “.” command to exit **Change Patron School** mode.

## Change Patron Homeroom

**Command:** NP {new homeroom code}

**Change Patron Homeroom**—Use this command to change the homeroom code for several patrons.

For example, to change a group of patrons to homeroom code `Brown`, type “NP `Brown`” and press <enter>. This activates **Change Patron Homeroom** mode. You can now enter all the patron barcodes whose homeroom code you want to change.

The transaction log will record the patrons whose homeroom code you’ve changed.

When you have entered all the patrons homeroom code you wanted to change, use the “.” command to exit **Change Patron Homeroom** mode.

## Change Patron Second Location

**Command:** NS {new 2nd location code}

**Change Copy Location**—Use this command to change the 2nd location code for several patrons.

For example, to change a group of patrons to 2nd location code `Smithers`, type “NP `Smithers`” and press <enter>. This activates **Change Patron 2nd Location** mode. You can now enter all the patron barcodes whose 2nd location code you want to change.

The transaction log will record the patrons whose 2nd location code you’ve changed.

When you have entered all the patrons 2nd location code you wanted to change, use the “.” command to exit **Change Patron 2nd Location** mode.

## Same Day Check Out

**Command:** OS {barcode}

**Checking Patron and Item Status**—This command performs a same day checkout for a specified item copy. This command works the same as a normal checkout, but the due date will be set for the end of the current day.

For example, the command “OS 3000” will check item copy 3000 out with the current date as the due date.

Circulation	
Start Bookdrop	⌘1
Make Charges/Payments	⌘2
Show Patron Details	⌘3
Patron Holds	⌘4
Patron Reservations	⌘5
Show Item Details	⌘6
Adjust Item Holds	⌘7
Remove Copy Reservations	⌘8
Renew Patron Items	⌘R
Broadcast message to clients	
Display all connected clients	
Advanced Bookings	
Process pending bookings	

## Make a Patron Current

**Command:** P {patron barcode}

**Make a Patron Current**—Use this command to make a specific patron the Current Patron. For example, to make patron 100 the Current Patron, enter “P100”. This command is useful if you have an overlap in patron and item barcode numbers. Alexandria will check the item barcodes before the patron barcodes. Therefore, if you enter the patron barcode on the command line or use the “X {barcode}” command, Alexandria will find the item rather than the patron.

## Checking Patron and Item Status

**Command:** Q {barcode}

**Checking Patron and Item Status**—Patron status includes information such as loaned items, due dates, reserved items, reservations, and library card expiration dates. **Item** status includes the circulation status, holds queue, and reservations queue for all copies of the specified title. This makes it very easy to find the status of a particular copy or the total status of the title.

Use the “Q” command to display the status of a patron or item.

- To view the status of a patron, type “Q” followed by the barcode number for the patron (typed or scanned) and press <enter>. If you do not enter a barcode, the status of the current patron is displayed.

If you don’t know a patron’s barcode, use the locate command (see “Locating Patrons and Items” on page 270) to find the patron and their barcode.

- To view item details, type “Q” followed by the barcode number (typed or scanned) for the item and press <enter>.

If you do not know an item barcode, use one of the find commands (see “Locating Patrons and Items” on page 270) to locate an item and its barcode.

There are two other ways to view the status of the Current Patron or Item:

- Use the **Show Patron Details** and **Show Item Details** commands on the **Circulation** menu.
- Click the **Details** icons in the Current Patron or Current Item section of the **Circulation** window.



## Renew Query

**Command:** QE

**Renewing an Item**—Displays a list of all books checked out to the Current Patron, allowing you to choose which books to renew (this is also a menu option).

## Renewing an Item

**Command:** R {item barcode}

**Renewing an Item**—Use this command to renew an item or activate **Renew** mode. You can specify the number of times an item can be renewed in your **Circulation Policies** (see “Policy Preferences” on page 141).

- To renew an item, type “R” and scan (or type) the barcode number for the item and press <enter>. If your Circulation Policies allow, this item is renewed to the patron who has it checked out. That patron also becomes the Current Patron.

If you do not know the item barcode, use one of the find commands (see “Locating Patrons and Items” on page 270) to find the item’s barcode.

- To start **Renew** mode, type “R” and press <enter>. All item barcodes you type or scan while in this mode are renewed. To exit **Renew** mode, enter a patron barcode number or use the “X” or “.” command.

If renewal is not allowed, a message will appear to inform you. A renewal is not allowed when the **Circulation Policy** is set to disallow renewals or when renewing an item would take it into a reserved date range.

## Renew All Items

**Command:** RA

**Renewing an Item**—When you have a current patron, this command renews all items for that patron. The **Renew All** command is different from the **Renew** command in that it overrides every policy restriction except for renews with holds on the item.



## Change Item Policies

**Command:** `UI {new policy code}`

**Change Item Policies**—Use this command to quickly change the policy codes for a number of copies. For example, suppose you want to mark a number of copies for overnight check out exclusively during the next two weeks. You can quickly create a policy for overnight checkout and then use this command to change the policy for those copies.

Alexandria saves the old policy so you can restore it later using the **Restore Previous Policy** command. Therefore, in the above example, at the end of the two weeks, you can restore the original policy.

## Change Patron Policies

**Command:** `UP {new policy code}`

**Change Patron Policies**—Use this command to quickly change the policy codes for a number of patrons. This command works for patron policies exactly like the “UI” command (explained above) works for copy policies.

## Restore Previous Policy

**Command:** `UR`

**Restore Previous Policy**—Use this command to quickly change patrons or copies back to their previous policy.

## Start Classification Mode

**Command:**   V [type] [keyword]

**Start Classification Modes**—Use this command to quickly add searchable terms to the items you scan.

Let's say you want to create a reading list on Olympic skiing. You would enter the command "V B Olympic Skiing" in the command line and press <enter>. Alexandria would display **B\*Olympic Skiing** above the command line. Any item you enter when in this mode would have the bibliographic keyword "Olympic Skiing" assigned to it. To end the **Classification** mode, enter the "." command in the command line. Once an item is classified, it can be searched for using the **Researcher** window.

If you would like to delete searchable classifications from item records, you may do so one at a time from the **Bibliography**, **Curriculum**, and **Interest Code** fields located under the **Categories** tab on the bottom half of the **Show, Items** window.

You can further delete, examine, and manipulate keywords en masse using the **Utilities**, **Catalog Utilities** command under the **File** menu.

Valid types include:

<b>S</b> — Subject	<b>R</b> — Study Program
<b>C</b> — Curriculum	<b>P</b> — Point Count
<b>I</b> — Interest/reading level	<b>T</b> — Test Number
<b>B</b> — Bibliography	<b>H</b> — Holding Code

Select **Search** from the **Show** menu to search for the items you've classified using this command. In fact, if a patron were searching for items on "Olympic skiing," those items would appear on any search performed after you classify the item.

## Make Item/Patron Current

**Command:**    X {barcode}

**Make a Patron or Item Current**—Use this command to make an item or patron barcode the Current Item or Current Patron. For example, “x100” makes patron 100 the Current Patron and “x110034” makes item 110034 the Current Item. If you enter an “x” without a barcode, Current Items and Patrons are cleared and the window is restored to **Check In/Out** mode.

## Clear Current Patron/Item Mode

**Command:**    X

**Clear Current Patron/Item Mode**—Use this command to clear the Current Patron, Current Item and **Override Date**.

## Start Statistics Mode

**Command:**    Y {optional date}

**Start Statistics Mode**—Use this command to record items as being used, without checking them out. If certain items in your collection are often used without being checked out, use this command to collect better statistics about library usage.

Alexandria counts a check out as usage of an item. However, there are many times when an item is used, but is not checked out. For example, books left on tables in the library at the end of the day were probably used even though they were not checked out. You can enter these item barcodes before re-shelving them and they will be marked as used for the purpose of collection statistics.

When you enter a barcode under this command (followed by an optional usage date), the item usage statistics and time-based statistics are updated, and the item is marked as “used” in the transaction log.

To use a portable reader to record used items, enter “Y” on the command line and then scan the item barcodes.

## Clear the Transaction log

**Command:**    Z

**Clear the Transaction log**—This command removes all entries in the visible transaction log. However, the log entries saved to disk are not affected by this command.



# Searching

This chapter explains how to search Alexandria library collections. By using the **Researcher** window (found under the **Show** menu), users can search local collections or authorized locations over a wide-area network.<sup>1</sup>

Searching is available for Alexandria Data Stations, Librarian Workstations, Researcher Workstations, and various Web Browsers.<sup>2</sup>

## The Researcher Window

Because patrons have different skill levels and requirements, the Alexandria **Researcher** window has numerous interfaces for searching. You can choose a default search interface using the **Alexandria Researcher** preference window that best fits the needs of your patrons (see “*Alex Researcher Preferences*” on page 93).

- Using the **Boolean** interface, patrons can choose the collection to search, the search type (e.g. subject or title), enter a search value, and use Boolean operators to narrow the search. This is Alexandria’s primary catalog search tool. Experienced users will typically use Boolean for all their searching (see “*Boolean Search*” on page 286). Boolean is the only interface used for Alexandria WAN.
- The **Simple** interface is for younger patrons or those who don’t have strong English language skills. It requires the user to enter a search value, then click an index-type icon to perform the search (see “*Simple Search*” on page 289).
- The **Browse** interface is useful for patrons who want to “browse” categories for things that interest them; it is also useful to patrons who are unsure how to spell a specific search term. Enter a search value, even if it’s only the first few letters, click on the **Search** button, then select the terms you want from the results list (see “*Browse Search*” on page 291).
- The **Study Program** interface is useful for patrons who are using study programs such as Accelerated Reader or Reading Counts. It allows the user to search the collection based on the study program name, reading levels, points, subject, and interest code (see “*Study Program Search*” on page 292).
- The **Explore** interface provides a completely iconic interface that can be customized by the librarian for quick access to specific library resources. Since this option must be purchased separately, it’s documented in the “Alexandria Explore” starting on page 321.
- The **Z39.50** interface provides access to Z39.50 collections provided you have an internet connection and the collections you are trying to connect to have Z39.50 server capabilities. The librarian must configure a Z39.50 selection for each library (see “*Global Administration Preferences*” on page 72).

1. Access to wide-area network locations requires an **Alexandria WAN** license and *must* be configured on your Data Station.

2. If you’ve purchased an **Alexandria Web** license, your patrons can search collections over the internet by entering the IP address of the Data Station’s default browser address field.

Show	
Bulletin Board	
Patrons	⌘L
Items	⌘I
Circulation	⌘T
Search	⌘K
Dictionary	
Orders	
Budgets	
Vendors	
Subscriptions	
Routes	

## Boolean Search, Overview

Use the **Boolean** tab to search your collection or remote collections for which you have access. To view the **Boolean** tab, select **Search** from the **Show** menu.



The following steps are for general **Boolean** searches. The remaining sections of this chapter provide detailed information about other searching procedures.

**Step 1. Choose the collection to search.**

The drop-down menu in the upper left-hand corner of the window defaults to **Local Collection**. To search a different collection, use the drop-down menu to make another selection. Unless you've purchased the Alexandria WAN option (or are using a multi-collection license), only your library (**Local Collection**) will be available in the drop-down menu.

**Step 2. Choose the type of search.**

Use the **Search All Words** drop-down menu on the left side of the window to choose the kind of search you want to perform. You can choose to search from a multitude of choices, including **Authors**, **Titles**, or **Series**.

**Step 3. Enter a search word or phrase.**

In the field next to the **Search All Words** drop-down menu, enter a search value. For example, if you want to search by title, enter all of the title (or first part of the title) that you want to search for. You can use special characters or **Boolean** operators (**And**, **Or**, and **And Not**) to narrow your search. You may also use the **Browse** button to show a list of items in the collection that match your search values.

**NOTE:**

If you notice that you have some mistakes in a title or record, you can hold down the <alt> (Windows) or <option> (Macintosh) key and double-click the title to have the **Item Management** window open.

- Step 4. **Use the results of the search.**  
The search results are shown in the **Researcher** window.



- To change how the results list is sorted, click on the column heading (e.g. **Call#**, **Title**, **Author**, **Media**, etc).
- To view details for an item (including attachments), double-click on an item in the results list or select (highlight) an item and press the <enter> key or click the **Details** button.
- To save items from the results list, select (highlight) them and click the **Save List** icon shown below (see "Creating your own Custom Results Lists" on page 295).









- To place a hold or reservation on an item, select (highlight) it and click the **Hold / Reservations** icon shown below (see page 297 for more details).



- To print the search results list, click the **Print** icon shown below or select **Print** from the **File** menu (see "Result List Printing Options" on page 285).



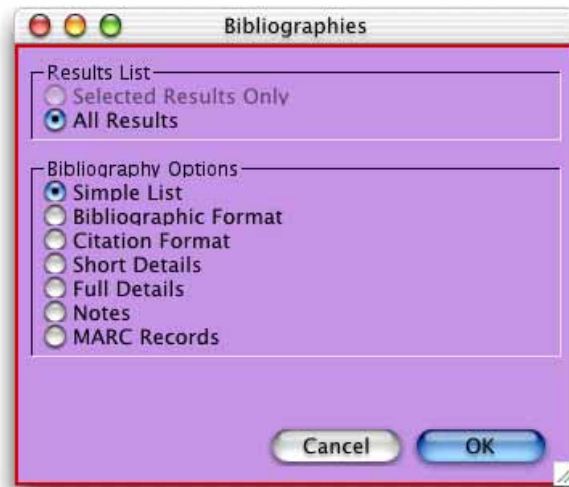
## Researcher Window Control Icons

	<p><b>Home</b></p> <p>Clears and resets the window for a new search.</p>
	<p><b>Big 6™ information</b></p> <p>Displays information on the <b>Big 6™</b> information problem-solving process.</p>
	<p><b>netTrekker™</b></p> <p>Opens a website that allows users to search <b>netTrekker</b>. This icon will only appear if you are a registered <b>netTrekker</b> user.</p>
	<p><b>Print</b></p> <p>Prints the contents of the <b>Search Results</b> window.</p>
	<p><b>Duplicate Window</b></p> <p>Duplicates the current window.</p>
	<p><b>Save List</b></p> <p>Creates a <b>Save List</b> for the selected titles of a results list.</p>
	<p><b>Hold or Reservation</b></p> <p>Use this icon to place a <b>Hold</b> or <b>Reservation</b> on selected items.</p>
	<p><b>Help</b></p> <p>Shows <b>Searching Help</b> information.</p>
	<p><b>Back</b></p> <p>Returns to the previous window.</p>
	<p><b>Previous - Next</b></p> <p>Shows <b>Details</b> for the <b>Previous</b> or <b>Next</b> record in the results list.</p>



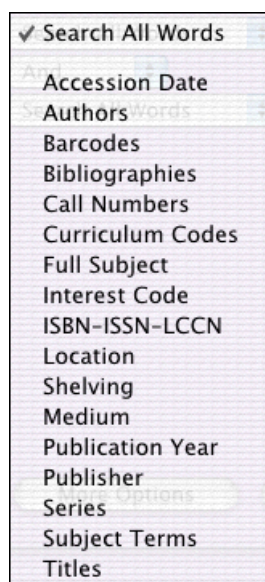
## Result List Printing Options

When you select **Print** from the **File** menu or click the **Print** icon when a search results list is showing, the following window appears:



If you've selected items from the results list, you have the option of making the **Selected Results Only** button if you want your report to include *only* the items selected from the results list. Otherwise, your report will include **All Results** from the result list. Printing formats include:

- **Simple List**—Shows only the data in the results list.
- **Bibliographic Format**—Shows a numbered bibliography.
- **Citation Format**—Shows titles in a citation format.
- **Short Details**—Shows key data for each title.
- **Full Details**—Shows all title information.
- **Notes**—This report includes the citation for the title as well as the project name, all given notes, and other questions or issues to research; this report prints one page for each item in the **Results** window.
- **MARC Records**—Shows MARC records for each title. These MARC records may be saved and imported into Alexandria.



## Boolean Search

Use the **Search All Words** drop-down menu on the left of the window to choose the type of search you want to perform. For example, you can choose to search by **Authors**, **Titles**, or **Series**, etc.



Alexandria searches the values of MARC records saved for each title. For **example**, when you choose to search **Authors**, Alexandria searches for authors in the **100** and **700** tags.

A search returns a maximum of 500 items unless holding down the <alt> (Windows) or <option> (Macintosh) key when clicking the **Search** button. If the item you are looking for isn't found in the results list, you may have to narrow your search criteria (*see page 98 for information on changing this preference*).

Use the **More** and **Fewer Options** buttons to toggle **Search** drop-down menus for additional or less Boolean search values. Alexandria supports up to six levels of Boolean searching.

When searching with single words or phrases, you can use the following special characters to narrow the search criteria:

- End a word with a period (" . ")—this tells Alexandria to perform an *exact* search for the word.
- Start a word with a question mark (" ? ")—this tells Alexandria to look for words that *sound like* the word you've entered.

If you enter a single word, Alexandria searches for words or phrases that begin with the text you enter. However, if you end the text with a period (" . "), Alexandria only searches for data that matches your text exactly. For example, if you enter "child", Alexandria searches for all words beginning with "child" (including "child" or "children"). If you enter "child. ", Alexandria only searches for the word "child."

If you don't know how to spell a word, enter the word preceded by a question mark. Alexandria will perform a *sounds-like* (phonetic) search.

You can set preferences in the **Librarian Workstation** to automatically prompt patrons to do a *sounds-like* search if the initial search fails to find results (see "Alex Researcher Preferences" on page 93).

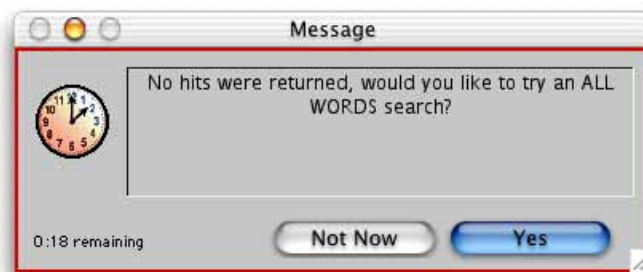
When you enter more than one word as an **All Words** search, Alexandria does the following:

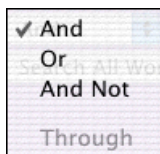
- Step 1. Alexandria will search with each word of the phrase, looking for any item that includes all of the words. If no match is found, Alexandria asks you (if the preference is turned on) if you would like a *sounds-like* search. If selected, Alexandria performs a phonetic search for all the words you've entered.

When performing searches *other* than **Search All Words**, Alexandria will search for items that begin with the value you've entered. If no match is found, Alexandria will then ask you if you'd like to perform an **All Words** search. If you answer **Yes**, Alexandria will look for records that contain *all* of the words in your query. Finally, if your **Alexandria Researcher** preferences allow, it will prompt you for a *sounds-like* search.

**NOTE:**

The **Through** option is not available for use with an **All Words** search.





## Using Boolean Operators

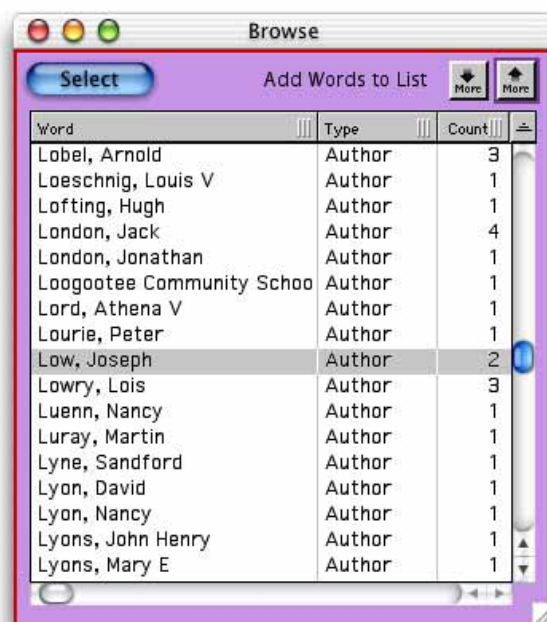
Alexandria supports Boolean operators (**And**, **Or**, and **And Not**) for all selections; and a range operator (**Through**).

It is recommended that you start with the most general searches first (usually joined with **Or**) and more specific searches last (usually connected with **And**).

## Using Browse Buttons

To the right of the search value field is a **Browse** button (or buttons depending on your Boolean parameters).

Click the **Browse** button to browse a list of items in your collection that most closely match the search values you entered. If you have not yet entered values in the search value field, the browse list will begin with the first item in your collection.



To copy a selection from the **Browse** window to the search value field in the **Researcher** window, double-click on a selection.

For example, if you double-click "Asimov, Issac" (**Author**) from the window above, the **Researcher** window reappears with "Asimov Issac" in the search value field.

Only entries of particular index-types appear in the **Browse** window. For example, if you are searching **Subjects**, only **Subjects** index-types appear.

## Simple Search

Use the **Simple** tab to easily search your collection, using a simplified interface.



Enter a search value in the **Search For** field, then click on one of the giant graphics to choose the search index-type. The results list appears with all the items in your collection that closest match your search value and index-type. The **Simple Search** results list can be set to either a **Simple** or **Standard** result-format depending on your **Alexandria Researcher** preference settings.

If you type a value in the **Search For** field and press <enter>, Alexandria performs an **All Words** search.

## Explore Search

If you've purchased the **Alexandria Explore** option, your **Researcher** window will contain an additional **Explore** tab. Click this tab to view your default **Explore** pane.



To search using the **Alexandria Explore** interface, click on one of the icons. Some pictures will take you to new panes; others perform an Alexandria search. Some will open a website using your system's default web browser; others will open files on your local hard drive. The entire interface can be customized to meet the needs of your library.

When users are exploring panes beyond the default pane, they can navigate by using the **Back** button or return to the default pane window by clicking the **Home** icon.

For more information, please see the "Alexandria Explore" starting on page 321.



## Browse Search

Use the **Browse** tab to search your collection using specific terms.



To perform a **Browse** search, perform the following steps:

- Step 1. Enter a search value in the provided field. In the example above, "asimov" was entered.
- Step 2. Click on a index-type button. In the above example, **Author** was clicked.
- Step 3. Examine the results. Alexandria shows a list of terms centered around the one you selected. In the above example, **Authors** are shown with **Asimov** in the middle.
- Step 4. Highlight the term (or terms) you want to search by clicking on its line. You can <Cmd>-click (Macintosh) or <Ctrl>-click (Windows) multiple lines.
- Step 5. To perform a search, press <enter> on your keyboard, click the **Author** button again, or double-click one of the selected terms.
- Step 6. Alexandria will perform the search and display a **Simple** results list (see "Simple Search Results List" on page 296).

Browse searching is useful when you don't know the exact terms that you want to search for. It allows you to view available values before performing a search.

## Study Program Search

Use the **Study Program** tab to search your collection for items that have been classified in a study program (such as Accelerated Reader).

The Study Program Search lets you search for books covered under different study programs such as Accelerated Reader and Reading Counts. You can choose which Program, Interest Code, Reading Level, and Subject for which you are searching. For Interest Code, Reading Level, and Point Count, you can enter a range of numbers: if you are not sure exactly which number you are looking for: Interest Code can go from 1 to 13, Reading Level can go from 0 to 99.9, and Point Count can go from 0 to 9999.9. If you don't fill in some of the fields, they will be ignored during the search.

Program Name:  The 'Grade Level' you are looking for. (1 to 13)

Interest Code from:  to  The Reading Level of the book. (0 to 99.9)

Reading Level from:  to  How many points the book is worth. (0 to 9999.9)

Point Count from:  to  The subject you want to find a book about.

Subject:

Other Words:  Anything else you want to be in the book.

To perform a **Study Program** search, perform the following steps:

- Step 1. Select a Study Program name from the **Program Name** drop-down menu. **Any** selects *all* items with study program tags. **Other** selects programs *other* than **Accelerated Reader** or **Reading Counts**.
- Step 2. Select a range of interest codes. If you don't care about interest codes, select **None**.
- Step 3. Enter a range of reading levels. If you enter only one value, only that single value will be searched.
- Step 4. Enter a range of point counts. Only items within that point count range will be chosen.
- Step 5. You can additionally narrow study program item results with a specific **Subject** value.

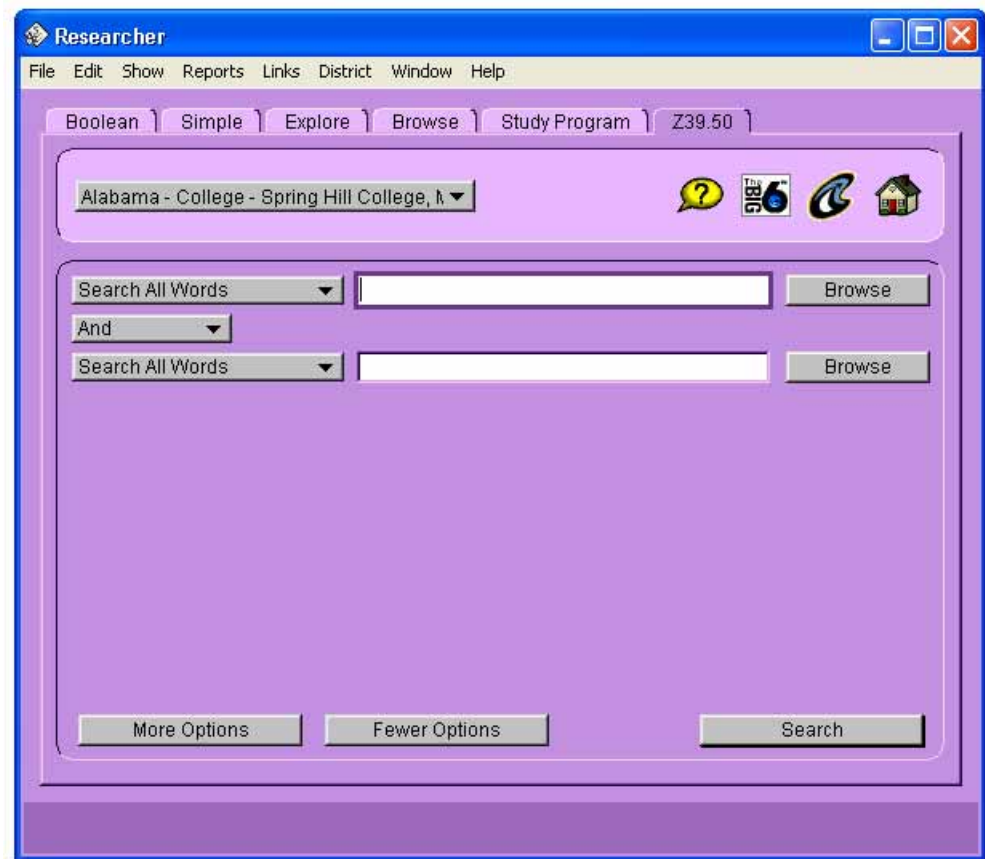
Alternately, you may enter any **Other Words** you want to find in selected Study Program records.

- Step 6. Click the **Search** button or press <enter>.
- Step 7. Alexandria will perform the search and show a results list containing all records containing the search values you've provided (see "Simple Search Results List" on page 296).



## Z39.50 Search

The **Z39.50** search interface is nearly identical to the **Boolean** search interface. The main difference, however, is that while **Boolean** only searches the Alexandria databases found within your district, a **Z39.50** search can delve into hundreds of hand-picked **Z39.50** servers.



To choose a Z39.50 server to search from, select one using the drop-down menu that is located near the top of the **Researcher** window.

If you get an error message when you click on the **Z39.50** tab saying that there are no Z39.50 servers available to search from, you will need to activate a few in your **Global Administration Address Book** preferences (page 72).

Make sure that any **Standard Z39.50 Address Book** you want to search have their **Availability** (*for more information, please see page 76*) set to **Available**. This will activate the server's address in the drop-down menu located at the **Z39.50 Search** tab. If the Z39.50 server you would like to search has their availability set to **Hide Everywhere**, you will be unable to perform a search from the Alexandria **Z39.50** window.

Because the **Z39.50** search interface so closely resembles the **Boolean** search interface, please refer to this chapter's section on **Boolean** searching (*starting on page 286*) for more information on how to use the **Search All Words** and **Browse** drop-down menus, or any other information that pertains to **Boolean** operators or searching.

## Standard Search Results List

Depending on the type of search you've performed and your **Alexandria Researcher** preferences, Alexandria will show a **results** window when your search has completed. The top portion of the window provides a summary of your search, followed by the number of items found. Alexandria may display the results list before it has completely added all results to the list.



The results list window above is shown when performing a **Boolean** search. The results list shows the **Call#**, **Title**, **Author**, **Media** and **Availability** for all titles that match your search value. This window shows the results of your search in the order that they were located. Click the column headers to alphabetically sort the list.

Use the <up> and <down> arrow keys or click on items to select (highlight) them. To remove a result from the list, highlight it and select **Cut** from the **Edit** menu (or press <delete> on the keyboard). To select multiple items, hold down <shift> while you click on items, or select the first and the last item you want. To select multiple non-sequential items, hold down the <ctrl> (Windows)|<cmd> (Macintosh) while you click on items.

To print the contents of the results list or saved list, chose **Print** from the **File** menu or click on the **Print** icon.

If you are using **Alexandria Librarian**, hold down <alt> (Windows)|<option> (Macintosh) and double-click on an item in the list to quickly go to the **Items Management** window with that item you selected.

If you are using **Alexandria Librarian**, an asterisk symbol ("\*") appears at the end of the title when an item is marked as **Don't Show in Alexandria Researcher**.

## Creating your own Custom Results Lists

To create a list of items from the results list, select the items in the list you want to save and click the **Save List** icon. In the example below, the highlighted (in gray) items were saved from the results list.



When you click the **Save List** icon with selected (highlighted) items, a new **Save List** window appears containing the items you have selected to save.



You can move items from list to list by highlighting them and using standard operating system editing functions (i.e. drag and drop, **Cut**, **Copy**, and **Paste**). You can also copy lists into word processing documents.

Use <ctrl>-click (Windows) or <cmd>-click (Macintosh) to select non-adjacent items and <shift>-click to select groups of items. Use <delete> or the **Clear** command from under the **Edit** menu to remove items. You can also use the **Cut/Copy/Paste** commands under the **Edit** menu to move items from list to list, or to a word processor. You may also drag and drop items or item groups between lists.

## Simple Search Results List

Depending on your **Alexandria Researcher** preferences, you may get the following **Simple** results window:



To view more results, click on the large up and down arrows.

To sort the list, click on the word **"Title," "Author,"** or **"Call#"** in the **Sort Results By** area located in the upper right-hand side of the **Researcher** window. The current sort order is shown in **bold**.

To view details for one of the items, click it once. The **Simple Details** window will appear (see *"Viewing Item Details from a Simple Search Results List"* on page 301).

## Placing Holds and Making Reservations

Patrons can place holds or make reservations on items from **Researcher Workstations** if you've set the **Allow Holds and Reservations** preference (see "Alex Researcher Preferences" on page 93). Holds and reservations can be placed from the results list, or **Details** window.

Use the **Hold or Reservation** icon to place a hold or reservation. If you have highlighted more than one item, Alexandria only processes the first selected item. On the **Details** window there is also a **Place Hold** and/or **Place Reservation** link at the bottom.

- Hold requests are placed on titles rather than individual copies. A patron who places a hold on an item is alerted when a copy of the title becomes available. If an item is currently available, an in-stock hold is placed. Otherwise, a standard hold request is placed.
- Reservations are placed on individual copies. Patrons must find copies that are available on the days they want to reserve.

### To place a Hold, do the following:

- Step 1. Select the **Hold** icon from the results list, or **Place Hold** in a **Details** window.
- Step 2. Mark the **Place Hold** radio button.
- Step 3. Enter your **Patron Barcode** and **Password**.



Your password must match the master record, or access will be denied. The default password is the patron's last name. Patrons can change their password (if preferences allow) using the **Change Password** window in Alexandria Researcher. No spaces or punctuation are allowed in the password. Therefore, if a patron's last name is hyphenated, enter the name as one long word.

- Step 4. If you choose **OK**, your hold is placed and a confirmation virtual word processor document is shown. You may print or save it just like any other Alexandria virtual word processor document by selecting **Print** or **Save** from the **File** menu. To cancel, close the window using your operating system standard close box or click the **Cancel** button.

**To place a Reservation, do the following:**

- Step 1. Select the **Reservation** icon from the results list, or **Place Reservation** link on a **Details** window.
- Step 2. Mark the **Place Reservation** radio button.



- Step 3. Enter your **Patron Barcode** and **Password**.

Your password must match the master record, or access will be denied. The default password is the patron's last name. Patrons can change their password (if preferences allow) using the **Change Password** window in Alexandria Researcher. No spaces or punctuation are allowed in the password. Therefore, if a patrons last name is hyphenated, enter the name as one long word.

- Step 4. Select the **Reservation Beginning** and **Ending** dates and click **OK**. Alexandria attempts to locate a copy that will be available during the date range. If none are available, a further selection window will appear.

Once a reservations has been placed, a confirmation virtual word processing document appears, you may print or save it just like any other Alexandria virtual word processing document by selecting **Print** or **Save** from the **File** menu.

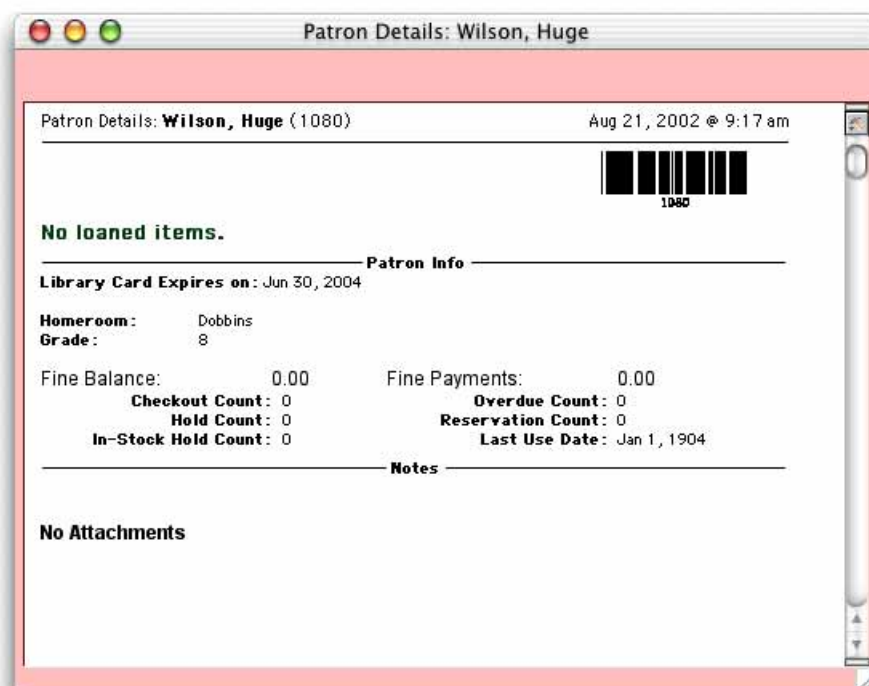


## Displaying Patron Details

Patrons can view the status of items they have checked out, holds and reservations they have placed, and other information from an **Alexandria Researcher**. Patrons can only check their own status, not that of other patrons. This is also where patrons can change their password (if allowed) by using the **Change Password** button. You must enter the new password twice to confirm the change. Passwords are *never* shown on the screen, all you will see are black filler characters.

Patrons use the following steps to check their status:

- Step 1. Select **Patron Details** from the **Show** menu.
- Step 2. Enter your **Patron Barcode** and **Password**, then click **Get Status**. Your password must match your master record, or access will be denied.
- Step 3. A **Patron Details** window appears with patron information. The user may print or save it just like any other Alexandria virtual word processing document.



## Viewing Item Details from a Standard Search Results List

To view detailed information for an item in the results list, highlight and double-click an item. Alternately you can select a line item and click the **Details** button.

If you use the **Duplicate** icon in an item's **Details** window, the information is copied into a standard virtual word processing window. You can print it, save it, or copy information into any other word processing window using standard operating system editing functions from the **Edit** menu.

To launch an item attachment, click on the **Details** window.



### - N O T E -

On a Macintosh, you must have `INTERNET.CONFIG` installed to launch a URL attachment. This is part of the standard Mac OS. **QuickTime** is required to launch video or image multimedia files.

To view an attachment, click on the attachment name.

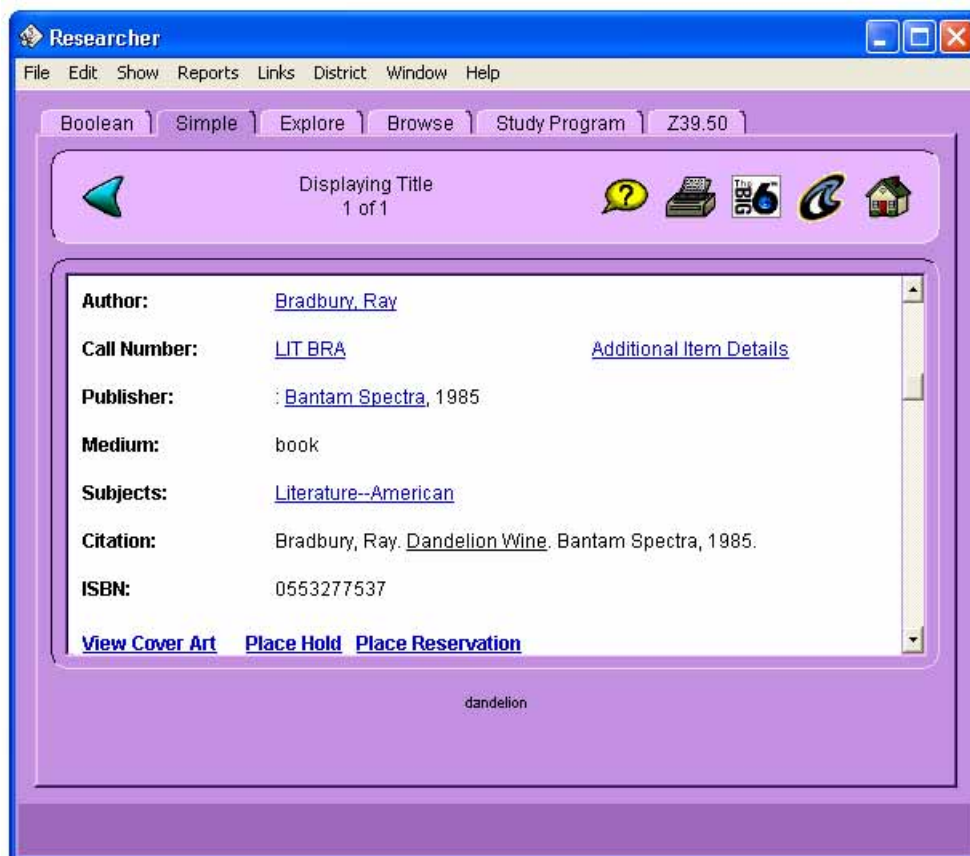
You can set an **Alexandria Researcher** preference to determine how much detail appears on the **Details** window (see "Alex Researcher Preferences" on page 93).

If your preferences allow viewing MARC records, a **View MARC Record** link is available. In the same way, if **Holds** or **Reservations** are allowed, links are shown at the bottom of the item **Details** window. Furthermore, if you are a registered **Sneak Peek** subscriber, then an **Additional Item Details** (customizable term) and **View Cover Art** link will become available in the item **Details** window. For more information on setting your **Sneak Peek** preferences, please see page 128.



## Viewing Item Details from a Simple Search Results List

To view item information in the **Simple** results list, click on the line of the item you want to view. The **Simple Details** window is a simplified version of the **Standard Details** window.



Use the large arrows at the bottom of the window to view details for each **Title** in the **Simple** results list.

If you are a registered **Sneak Peek** subscriber, then an **Additional Item Details** (customizable term) and **View Cover Art** link will become available in the item **Details** window. For more information on setting your **Sneak Peek** preferences, please see page 128.

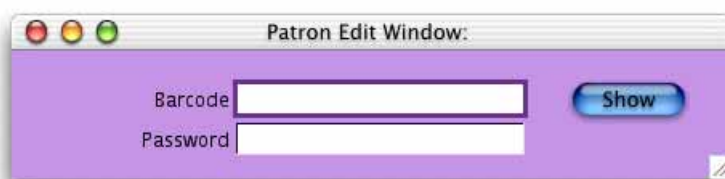
Clicking on the **Additional Item Details** or **View Cover Art** links will open the Syndetics **Sneak Peek** website, providing supplementary information about the book you are researching.

## Changing Patron Information

Although librarians can quickly change patron information using the **Patron Management** window (see *"Patron Management Preference"* starting on page 137), it's often necessary for patrons to make changes to their records. This interface also provides librarians with an easy way to change some patron information. Depending on your preference settings (see *"Alex Researcher Preferences"* on page 93), users may be restricted from making changes.

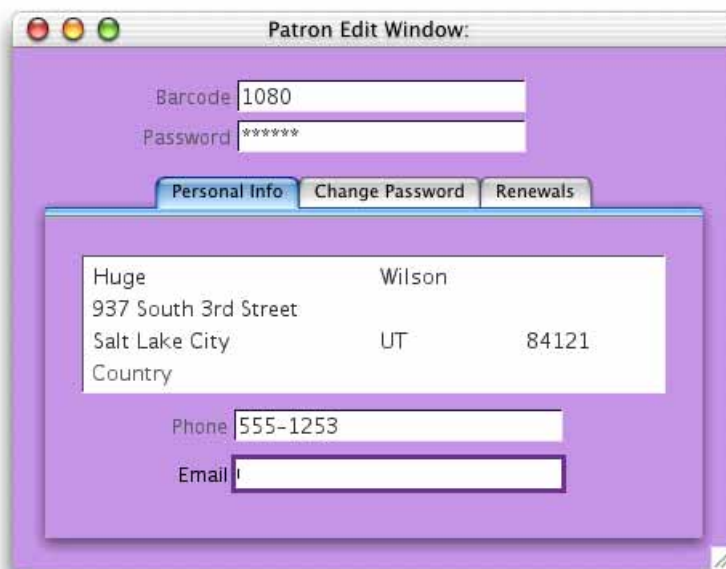
There are two primary ways to activate this interface. The fastest way is to click the **Edit Patron Information** link at the bottom of the **Patron Details** window. You may also select **Simple Patron Edit** from the **Show** menu.

First, identify yourself. If you haven't already, enter the patron **Barcode** and **Password**.

A screenshot of the 'Patron Edit Window' with a purple background. It features two text input fields: 'Barcode' and 'Password'. To the right of the 'Password' field is a blue button labeled 'Show'. The window has standard macOS-style window controls (red, yellow, green buttons) in the top-left corner.

### Personal Info

Once you're identified as someone authorized to change a patron's data, you'll see the **Patron Edit** window.

A screenshot of the 'Patron Edit Window' showing the 'Personal Info' tab. The window has a purple background. At the top, there are 'Barcode' and 'Password' fields with the values '1080' and '\*\*\*\*\*' respectively. Below these are three tabs: 'Personal Info' (selected), 'Change Password', and 'Renewals'. The 'Personal Info' tab displays a form with the following fields: 'Name' (Huge Wilson), 'Address' (937 South 3rd Street, Salt Lake City, UT 84121), 'Country' (Country), 'Phone' (555-1253), and 'Email' (Email). The window has standard macOS-style window controls in the top-left corner.

This window allows you to change certain **Personal Information**.

## Change Password

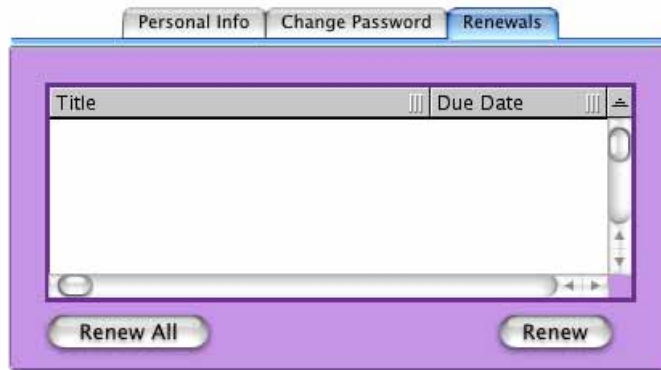
Click the **Change Password** tab to change the patron's password.

The screenshot shows a web interface with three tabs at the top: 'Personal Info', 'Change Password', and 'Renewals'. The 'Change Password' tab is selected and highlighted in blue. Below the tabs is a purple rectangular form area. Inside this area, there are three text input fields stacked vertically. The first field is labeled 'Old Password', the second is labeled 'New Password', and the third is labeled 'Verify Password'. Each label is to the left of its corresponding input field.

To change the password, enter the **Old Password** once, and the new password twice. If the **Old Password** you enter matches the current password, and if both the **New Password** and **Verify Password** fields are identical, the password will be updated. If the information isn't entered correctly, Alexandria will not change the password.

## Renewals

This interface also allows the user to renew some (or all) of their items. Click the **Renewals** tab.

The screenshot shows a web interface with three tabs at the top: 'Personal Info', 'Change Password', and 'Renewals'. The 'Renewals' tab is selected and highlighted in blue. Below the tabs is a purple rectangular form area. Inside this area is a table with two columns: 'Title' and 'Due Date'. The table has a scrollable content area with a vertical scrollbar on the right and a horizontal scrollbar at the bottom. Below the table, there are two buttons: 'Renew All' on the left and 'Renew' on the right.

To renew an item, highlight it and then click the **Renew** button. To renew all items, click the **Renew All** button. If a renewal is allowed, a new **Due Date** appears in the renewal list. If the renewal was not allowed, a window appears explaining why the renewal failed. Renewals are rejected if the patron has reached their renewal limit, if there is a hold pending for the title, if a reservation is pending for that specific copy; preferences must be set to disallow renewals when a hold or reservation is pending.



## Alexandria Web

This chapter explains how to search Alexandria collections using the **Alexandria Web** interface. Alexandria Web performs several **Researcher** functions using a standard world wide web browser such as **Netscape Navigator** or **Microsoft Internet Explorer**.

### - N O T E -

Alexandria Web is an optional feature of Alexandria. You must have purchased a separate license to use this feature.

## Connecting to Alexandria Web

Search for items in your Alexandria collection using the following steps.

- Step 1. To connect to your Alexandria Web interface, enter the IP address of the machine running your Alexandria Data Station (or click on a link containing this address).



- Step 2. Follow the instructions on the Alexandria Web page. Searching with Alexandria Web is almost identical to searching on an Alexandria Researcher.

Depending on your licenses, Alexandria Web supports a **Simple**, **Boolean**, **Browse**, **Study**, **Explore**, **Z39.50**, **netTrekker**, and **SearchALL** search (just like Alexandria Researcher). You can even place holds, reservations, and view patron details. You can even configure the Alexandria Web interface to display in foreign languages.

Of course, whether you choose to utilize all of these functions depends on your **Alexandria Web** and **Data Station** preferences (see "Web Preferences" on page 165).

Patron
<a href="#">Log In</a>
Last 5 Searches
Empty
Last 5 Items
Empty
Save Basket
<a href="#">Save Basket (0)</a>
Bulletin Board
<a href="#">Bulletins (0)</a>
Web Links
<a href="#">Web Links</a>
Library Information
<a href="#">Library Information</a>
Help
<a href="#">Help Page</a>
Language
English ▼

## Using Alexandria Web

The Alexandria Web interface consists primarily of a navigation menu (located on the left side of the page) and your search interface tabs (located across the top middle of the page). Although the Alexandria Web browser interface is fairly intuitive, the following pages will document some of its more obscure functionality.

**Log In/Log Out**—Toggles between the **Log In** and **Log Out**. Depending on your **Require ID/Password** Web preference, patrons may be required to log in before searching your collection. However, any circulation commands (holds, reservations, or renewals), patron details, or editing *will require* a patron to be logged in.

Login
Username: <input type="text" value="1080"/>
Password: <input type="password" value="*****"/>
<input type="button" value="Login"/>

**Log In** requires a patron name and barcode. Administrators will also need to log in on this screen using their username and password specified from their Data Station's **Administration** preference window.

**Patron Details**—If you have **Allow Patron Status Checks** checked in your **Web Patron** preferences, then this hyperlink will be available to current patrons. Once clicked, a **Patron Details** window will open, allowing patrons to view the items they have checked out, on hold, and reserved. Administrators, once logged in, will be able to view any patron's status information.

**Patron Edit**—If you have **Allow Patron Edit** checked in your **Web Patron** preferences, then this hyperlink will be available to patrons who have logged in. Once clicked, an edit window will open, allowing patrons to edit their own **Personal** information (e.g. **First** and **Last Name**, **Address**, **City**, **State**, **Postal Code**, **Country**, **Phone Number**, **Email**), change their **Password**, and **Renew** any or all loaned items. Administrators, once logged in, will be able to edit any patron's information.

**Web Preferences**—If you have **Allow Remote Changes** checked in your **Web** preferences and are logged in as an Administrator, you are able to remotely change your Data Station's **Web** and **Patron** preferences. Administrators are given the same options as those found in the **Web** preferences (see "*Web Preferences*" on page 165).

**Last 5 Searches**—This section of the Web interface automatically records the last five successful user searches and provides links to return to those items.

**Last 5 Items**—This section of the Web interface automatically records the last five items viewed by the user and provides links to return to those items.

**Save Basket**—The **Save Basket** can store items for future reference. An item can be added to the **Save Basket** by clicking on the associated blue 'plus' symbol located to the left of the item title. If the 'plus' symbol is gray, the item is already located in the user's **Save Basket**. If there are no associated 'plus' symbols with items, the **Save Basket** feature has been disabled by the library **Administrator**. The **Save Basket** is similar to **Researcher Save Lists** (see "*Creating your own Custom Results Lists*" on page 295) except you can only add one item at a time. Clicking on the **Save Basket** hyperlink opens the **Save Basket Results** page, containing all your saved items.

**Bulletin Board**—If your Data Station contains any electronic bulletins, posts, notes, or library maps, clicking on the **Bulletins** hyperlink opens a **Bulletin Board** window containing a list of selectable bulletins and notices (see “*Bulletin Board*” on page 54).

**Web Links**—If you set web links in your **Web Links** preference window (see “*Links Tab*” on page 169), clicking on the **Web Links** hyperlink opens a **Web Links** window containing a list and description of all customized web links.

**Library Information**—This hyperlink pulls all pertinent information from fields in your **Library Information** preference window and displays them on an Alexandria Web page. Take special notice of the **Library Hours** field (see “*Local Settings*” on page 131).

**Help Page**—Click on the **Help Page** link if you don’t understand a certain value or definition of a field. The **Help Page** succinctly summarizes the bulk of the Alexandria Web interface.

**Language**—Users can select the language of the website at any time by choosing from the drop-down menu in the left menu bar. The language defaults to whatever is set in your **Library Information** preference window (see “*Library Information Preferences*” on page 127).



## Using Alexandria Advanced Web

Users who have licensed use of Alexandria’s **Advanced Web** will have the ability (if their access level permits) to run certain utilities, reports, and change preferences for the data station over the world wide web. However, users attempting to access these features must have permissions on the Administrator level.

In order for an administrator to access **Advanced Web**, they must log in by entering their username and password into the patron **Log In** section of the **Alexandria Web** browser window (see the **Log In/Log Out** explanation on the previous page). After the initial log in you will see an **Advanced Web** section embedded into **Alexandria Web**’s navigation menu (shown to the left).

Using the menu selections found under **Advanced Web**, users are able to remotely check out books to patrons, perform bookdrops, run a selected range of reports, perform Data Station utilities (e.g. rebuild, archive, upgrade, check resources), check Data Station status reports (e.g. number of connected users, system analysis, database statistics), and change your Alexandria **Web** preferences (see “*Web Preferences*” on page 165).

Having the ability to access these vital Data Station utilities, statistics, and preferences from any computer with internet capabilities proves invaluable in times of crisis.

## Searching With Alexandria Web

Using the tabs located across the top of the Alexandria Web browser window, click on the search interface you would like to use. Default is **Simple**.



If you are licensed for **Explore**, **Z39.50**, **netTrekker**, and **SearchALL** searching, these tabs will appear as well.

Searching with Alexandria Web is virtually identical to searching on an **Alexandria Researcher**. Therefore, to find more information on Web searching, refer to the general "Searching" starting on page 281; this chapter provides a abundance of basic **Search** information, interfaces, and procedures.

Here's where specific **Search** interface information can be found:

- “Simple Search” on page 289

- “Boolean Search” on page 286

- “Browse Search” on page 291

- “Study Program Search” on page 292

- “Explore Search” on page 290

- “Z39.50” starting on page 293



## Alexandria Web Specific Searching

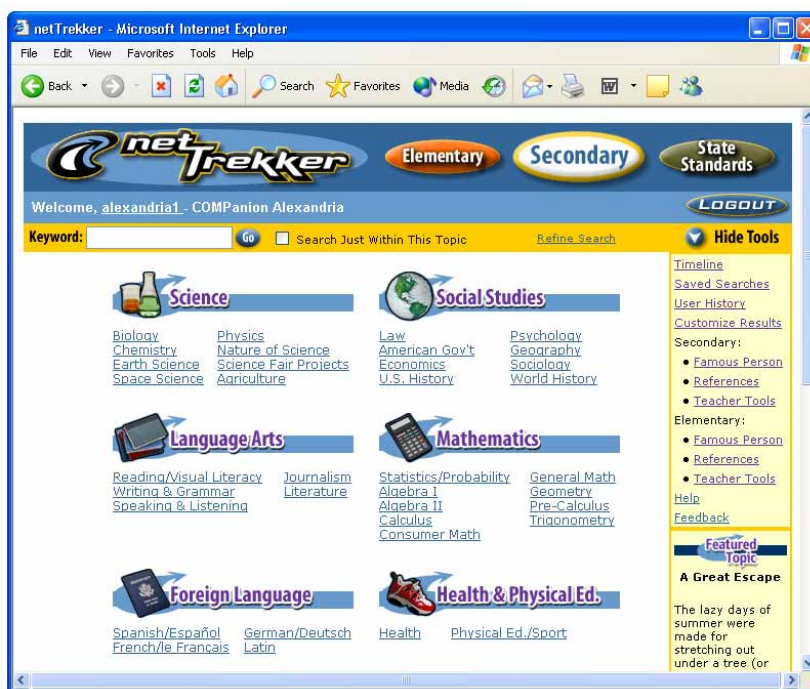
Users will happily discover that **Alexandria Web** also supports two additional add-on search interfaces, Thinkronize's **netTrekker** and MuseGlobal's **SearchALL**.

### netTrekker

#### - N O T E -

**netTrekker** is an optional feature of **Alexandria Web** and **Alexandria Explore**. You must have purchased a separate license to use this feature. When you have licensed use of this search interface, a **netTrekker** tab will appear in the **Alexandria Web** browser and as a button in the **Alexandria Explore** search interface.

netTrekker is a trusted search engine for schools, providing fast and easy access to more than 180,000 high quality, pre-screened, and educationally-relevant K-12 on-line resources. These on-line resources also align with each state's academic standards and benchmarks and can be used in the classroom to stimulate instruction and learning.



Clicking on the **netTrekker** tab will automatically log you into the **netTrekker** website where students and researchers may perform web searches that yield educator-approved (and rated) websites without worrying about having less scrupulous search results returned.

In order to successfully access the **netTrekker** website and fully utilize its capabilities, you must have the correct username and password entered in the **Library Information** tab of the **Global Library Information** preference window (see page 129 for more information).

## SearchALL

### - N O T E -

**SearchALL** is an optional feature of **Alexandria Web**. You must have purchased a separate license to use this feature. When you have licensed use of this search interface, a **SearchALL** tab will appear in your **Alexandria Web** browser.

Alexandria's **SearchALL** interface significantly enhances the process of information discovery and retrieval for library staff and patrons by establishing connectivity and communications among disparate systems.

Using a single search query, **SearchALL** can effectively search multiple libraries or any extended range of information sources, immediately eliminating irrelevant information and offering a rich, post-processing environment that allows patrons to work with and re-use their search results.

**SearchALL** uses an internal framework that allows it to consistently process tens of hundreds of results from different systems. This multi-protocol architecture makes it possible for **SearchALL** to communicate with multiple information systems at one time and to "talk to" these systems in their own native "language." **SearchALL**'s powerful communication and translation abilities means it can "recognize" data and commands from disparate systems and return results formatted for use within Alexandria. This means that a much broader range of informational sources and systems can be searched at one time, with the most efficient and meaningful results retrieved from each source.

This allows diverse systems, such as virtual or physical library catalogues, proprietary databases, subscription, e-journals, full-text databases, intranet resources, specialized databases (such as digital or image collections), and web search engines, to connect, communicate and share information.

**SearchALL** presents search results in a uniform, easy-to-understand format, pre-merged and sorted.

All retrieved records are converted into an Alexandria format that can be edited or manipulated for eventual user display.

## Using the SearchALL Search Interface

When you click on the **SearchALL** tab on the **Alexandria Web** browser window, a search interface similar to the one below will appear.

The screenshot shows a web browser window titled "OneSearch - Microsoft Internet Explorer". The address bar shows the URL "http://www.alexandria.org/". The page features the "Alexandria" logo at the top. Below the logo is a navigation bar with tabs: "Simple", "Boolean", "Browse", "Study", "Explore", "Z39.50", "netTrekker", and "SearchALL". The "SearchALL" tab is selected. The main content area has a "Simple Search" button on the left. To the right, under the heading "Enter your search terms here:", there are two search input fields. The first field has a dropdown menu set to "All Words". Between the two fields is a dropdown menu set to "And". The second field also has a dropdown menu set to "All Words". Below the input fields are two buttons: "Search" and "Search Options". At the bottom, there is a section titled "All Sources" with a list of search engines and databases, each with a checkbox. The checked items are "Grace Sandlin Library", "Britannica Online", and "EBSCO Business Source Elite". The unchecked items are "New York Public Library", "Dictionary", "Canadian Encyclopedia", "Google", "Yahoo", "HotBot", and "ERIC".

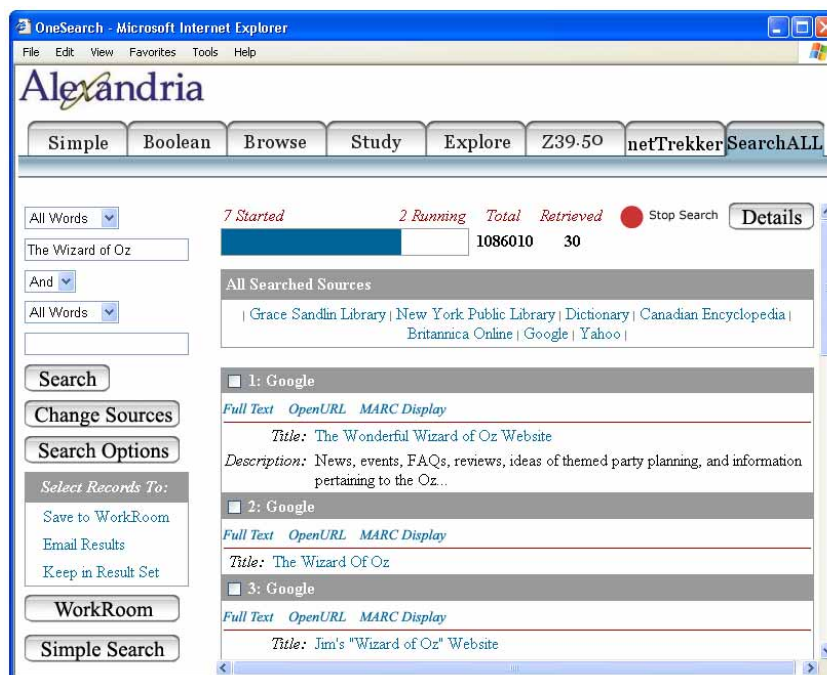
Using Boolean logic, enter the information that you would like to search for in the provided fields. Next, place checkmarks in the boxes next to the information sources that you would like to search. When you are ready, click the **Search** button.

If you would like, at any time, to stop the search in progress, click the red **Stop Search** button.

Clicking the **Simple Search** button at any time allows users to perform **SearchALL** searches under Alexandria's **Simple** search interface. This makes it easier for younger patrons to visually retrieve information from a multitude of sources.

If you would like to change your search options, click the **Search Options** button (*see page 314 for more information*).

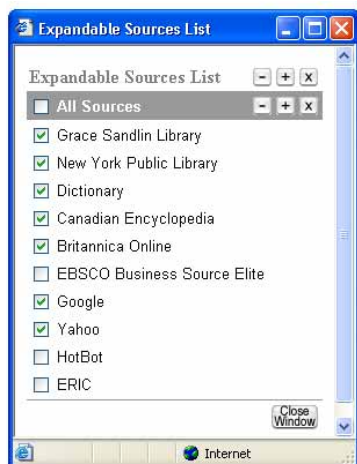
When a search has been performed, **SearchALL** will retrieve information from all the sources you have selected and display the results in a fashion similar to the example below.



Depending on the sources that were searched, users can choose to view their results as **Full Text**, **OpenURL** (if the search source was website related), or view the result as a MARC record using the **MARC Display** link.

After your search results have been received, you can click on the **Details** button to view a **Search Progress** window, detailing which informational sources were searched and how many hits (i.e. how much information) were received.

After a search has been performed, several new options become available:



**Change Sources**—Clicking on this button will open an **Expandable Sources List** window. If a patron is unsatisfied with their search results, this window will allow them to select additional informational sources to search. Simply select (checkmark) every source that you would like to search and click the **Close Window** button. When you return to the **SearchALL** browser interface, click the **Search** button again to perform an additional search using the newly selected sources

**Search Options**—Clicking this button opens the **SearchALL Options** window (see page 314 for more information).

**WorkRoom**—This button opens up a virtual “workroom” where selected (checkmarked) records can be stored for future use, printing, or processing.

### Select Records To

**Save to Workroom**—This link will save all your selected (checkmarked) records to a virtual “workroom.” This workroom will store your selected search results for further use, printing, or processing.

**Email Results**—This link will allow you to send selected (checkmarked) records to a specified email address. This is useful if you would like to send yourself (or a friend or family member) an electronic document of your search results for future reference.

**Keep in Result Set**—This link will allow you would to keep a selected (checkmarked) search result (i.e. record), while all others are deleted, including those on pages you have not yet viewed.

### Change Results By

**Display Level**—User’s can choose to view their search results in **Full Record Detail**, in **Brief Record Detail**, or as a **One Line Record**.

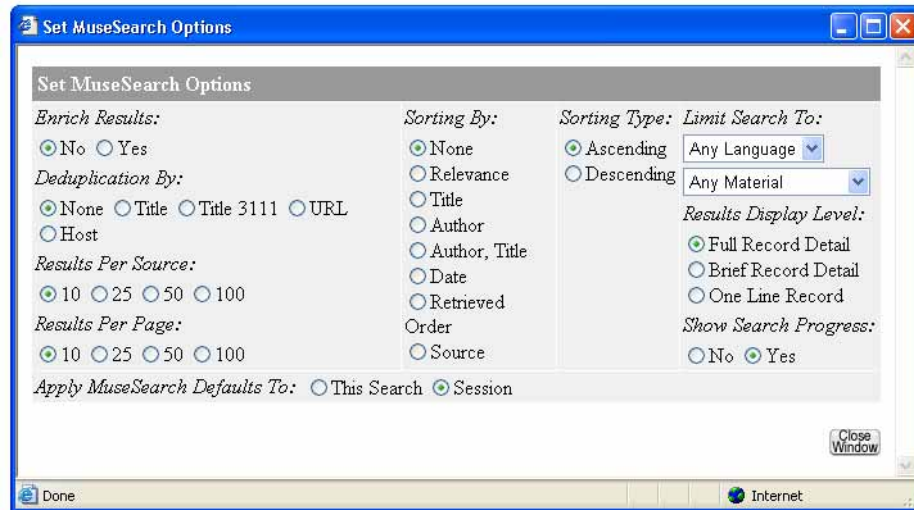
**Deduplication**—Deduplication is the process of filtering out duplicate search results. You can remove any search results that have a duplicate **Title**, **URL**, or **Host**.

**Sorting**—This drop-down menu allows you to sort your search results by relevance, title, author, author and then title, date, retrieved order, or source

**Filtering Out**—If you would like to skip any search results that contain a specific word or phrase, enter that information in the **Filtering Out** field. Any records that contain that keyword will be filtered from your search results.

## Set SearchALL Options

Using the options on this page, researchers are able to set several search preferences that are intended for a single search or for the entirety of their **SearchALL** session.



**Enrich Results**—This feature will enrich your returned search results.

**Deduplication By**—Deduplication is the process of filtering out duplicate search results. You can stop SearchALL from returning duplicate search results (by **Title**, **URL**, or **Host**) by selecting one of the deduplication filters.

**Results Per Source**—If a particular informational source consistently returns a bounty of information, users can choose to limit the results returned per source to **10**, **25**, **50**, or **100**.

**Results Per Page**—Users can choose to have **10**, **25**, **50**, or **100 SearchALL** search results displayed on the **Alexandria Web** browser interface at one time.

**Sorting By**—This drop-down menu allows you to sort your search results by relevance, title, author, author and then title, date, retrieved order, or source.

**Sorting Type**—Select whether you would like your search results displayed in **Ascending** (A-Z) or **Descending** (Z-A) order.

**Limit Search To**—Since **SearchALL** will search sites all around the world, you may retrieve results in languages foreign to your own. If you would like to limit search results to a specific language, select it from this drop-down menu.

**Results Display Level**—User's can choose to have their search results displayed in **Full Record Detail**, in **Brief Record Detail**, or as a **One Line Record**.

**Show Search Progress**—If you would like a status bar (that slowly fills) to appear while your search results are being retrieved, select **Yes**. If not, select **No**.

**Apply MuseSearch Defaults To**—After you have finished setting the above **SearchALL** options, you may want to apply these settings to every search you perform using **SearchALL** while you are logged into **Alexandria Web**.

If so, check the **Session** button. If you would like to apply these preferences for one search only, select the **This Search** option.

When the current user logs out, all preferences will return to their established defaults.



## Placing Holds and Reservations

If your **Alexandria Web** preferences allow, patrons may place holds or make reservations on items in your collection<sup>1</sup>. You must have a valid current patron logged in to process holds and reservations.

### Web Holds

If your **Allow Patron Holds** box is checked (see “Patron Tab” on page 167), a blue **Place Hold** hyperlink will appear near the bottom of the item details page (i.e. the item you are currently viewing).

When you click on this button, the item will be placed on hold for the current patron (i.e. the one who is currently logged in). If you’re a current patron who hasn’t logged in, you *may not* place a hold.

### Web Reservations

If your **Allow Patron Reservations** box is checked (see “Patron Tab” on page 167), a blue **Place Reservation** hyperlink will appear near the bottom of the item details page (i.e. the item you are currently viewing).

When you click on this button, you will be asked to enter a **Start** and **Ending Date** for the item you are placing a reservation on.

When you enter any type of specially formatted information such as dates you can enter values in a wide range of formats. For example, you can enter the date December 1, 2004 as: “Dec 1, 2004” or “12/1/04”<sup>2</sup> or “12.1.04” or “12 1 04”. If the year is 2004, you can just enter “12/1”. If the current month is December, you can just enter “1”.

If the item you wish to place a reservation on is available during the date range you specify, an Alexandria Web calendar will appear, showing the current patron’s reservation dates highlighted in red.

1. Holds and reservations both depend upon your Data Station’s **Circulation** and **Policies** preferences; make sure that these are set properly to guarantee the results you desire (see the “Introduction to Preferences” starting on page 61).

2. When you enter a two digit date, values between 0-30 are assumed to be 2000-2030 and values between 31-99 are assumed to be 2031-2099.





# Web Router

This chapter explains how to use Alexandria's Web Router. This feature is typically used by districts that manage multiple Alexandria Web sites.

## - N O T E -

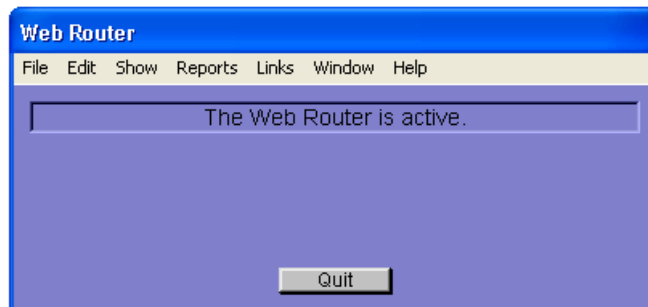
Alexandria Web Router is an optional feature of Alexandria. You must have purchased a separate license to use this feature.

Web Router is already integrated into Alexandria's software and is activated using Web Router registration codes. Therefore, you can install Web Router by installing Alexandria and then entering your Web Router registration codes. Make sure that the machine you are installing Web Router on meets the minimum Alexandria system requirements.

Web Router should be installed on a computer that is never turned off. Placing Web Router on a machine that is constantly running guarantees that people will be able to access information from the various sites you configure (in the **Web Router** preferences) at any time of the day. Since the only things stored on Web Router computers are **Sites** and **Preferences** information, there is no need to shut down to create backups.

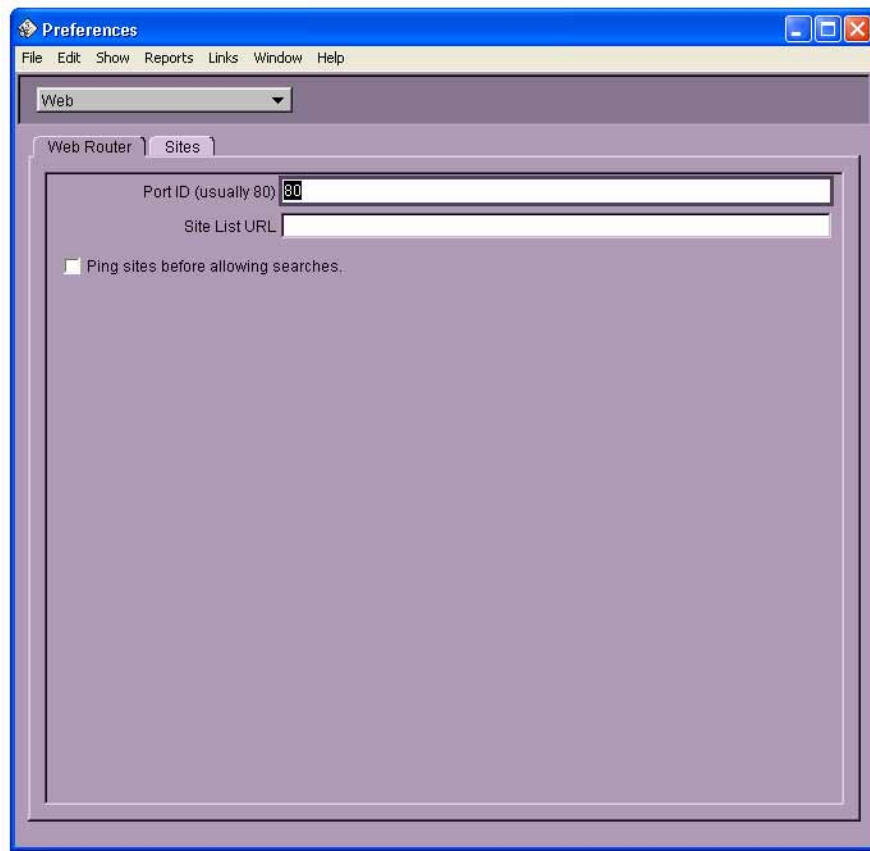
A shortcut to Web Router can be placed within your system's startup folder. Placing a Web Router shortcut in this folder ensures that Web Router will be automatically launched should the machine be accidentally reset or restarted.

Once Web Router has installed and registered correctly, the Web Router main window will appear (as shown below).



## Configuring Web Router

To configure your Web Router information, select **Web** from under the **Edit, Preferences** drop-down menu. The window below should appear.



### Web Router

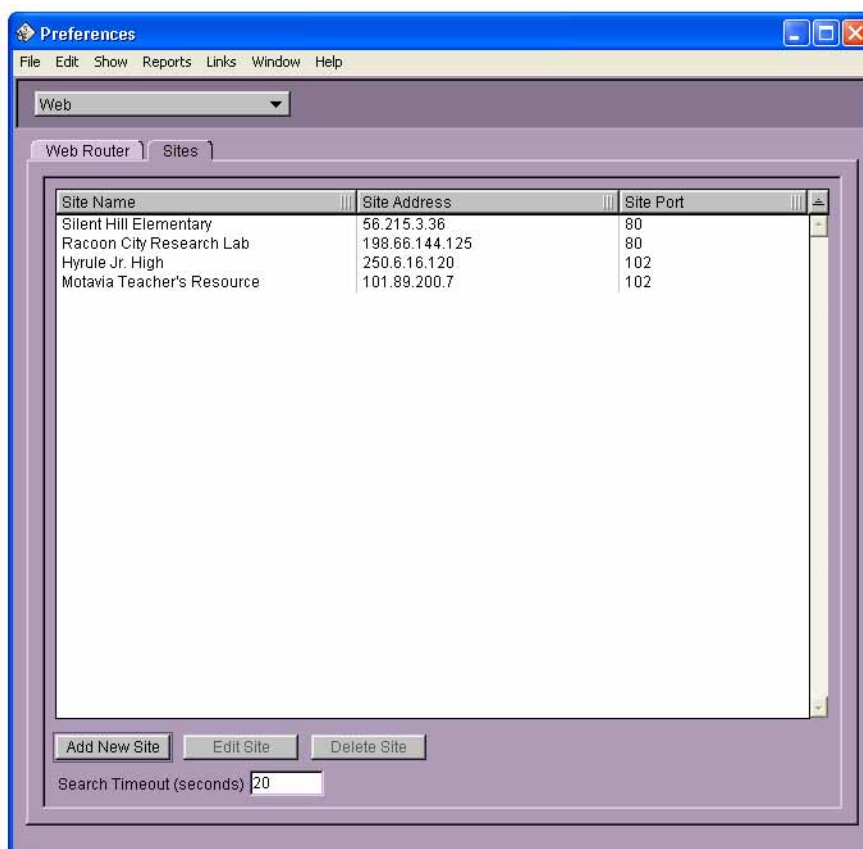
**Port ID (usually 80)**—This field is used to change the port on which the Web Router broadcasts. Port 80 is used by default. Ports for individual Alexandria Web sites can be set up under the **Sites** tab.

**Site List URL**—This field allows you to enter the web or IP address of the main site list. Leave this field blank to use the Web Router's current IP address.

**Ping sites before allowing searches**—Checking this box tells Web Router to make sure that the site is up and functioning correctly before transferring users to the sites page. Default is unchecked.

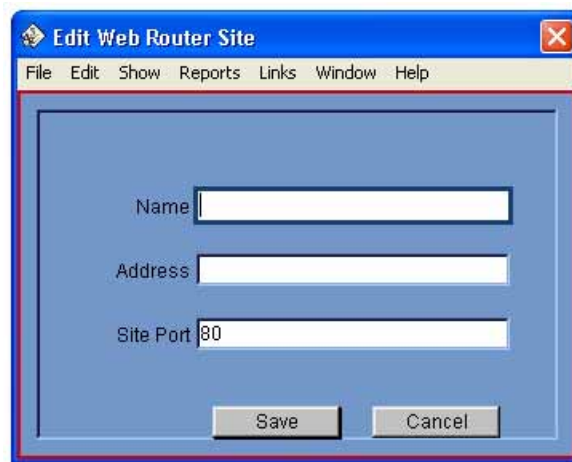
## Sites

The list of searchable Alexandria Web Router sites can be modified under the **Sites** tab. To add a site to the list, click **Add New Site**. To edit an existing site, highlight the **Site Name** from the site list and click **Edit Site**. To remove a site from the list, select (highlight) the **Site Name** and then click **Delete Site**. Once a site has been deleted, it is permanently removed.



The **Search Timeout (seconds)** field allows you to determine how long Web Router will try to access the site before giving an error message that the site is unavailable.

The following window appears when you choose to **Add New** or **Edit** a site.



**Name**—This field usually contains the school name of the site being accessed. This is a user-defined field.

**Address**—This field contains the IP address of the site's Data Station.

**Site Port**—This field displays the port that the indicated Data Station has been configured to use. This port setting can be located on their Data Station by accessing **Web** preferences under the **Edit** drop-down menu (see "Web Preferences" on page 165)

**- N O T E -**

The Alexandria Web Port preference is set to 80 by default.

## Alexandria Explore

This chapter explains how to configure, create, and search Alexandria collections using the Alexandria Explore interface.

### - N O T E -

Alexandria Explore is an optional feature of Alexandria. You must have purchased a separate license to use this feature.

Alexandria Explore provides a fun and attractive iconic interface which patrons can use to search local collections and other such activities.

Each button in the iconic interface can be arranged with an attractive picture and short text label. Alexandria Explore supports multiple languages, so labels shown below the icons will dynamically change depending on your language settings.

Each button (icon) can be configured to do one of the following actions.

None
Display a message
Search
✓ Go to another pane
Launch a URL
Launch a file or application
Open a help file

- **None**—An picture will appear, but the button does nothing.
- **Display a message**—Clicking on a button will display a message. Use this function to configure simple messages for library patrons.
- **Search**—Search using the Alexandria **Boolean** interface, so any search can be performed by clicking on a button.
- **Go to another pane**—Opens a different pane in the **Explore** search window. This allows you to create a powerful iconic interface tree.
- **Launch a URL**—Perhaps you have cataloged a number of useful websites for your patrons. These sites can be entered into **Explore** so that clicking on an icon will take users to that site.
- **Launch a file or application**—Any files or applications that can be opened in your standard operating system can be launched when you click on an Alexandria Explore icon. Use this function to show pictures, play movies, play soundtracks, open utility programs, mount file servers, or anything else you can imagine.
- **Open a help file**—Provide an additional help button from within Alexandria **Explore**. Any Alexandria help document can be opened.

### - T I P -

The Alexandria Explore interface allows users to import and export **Explore** panes. Thus, you can share your creations with other librarians who have licensed Alexandria Explore in your district or around the world.

## Alexandria Explore Preferences

If you've purchased Alexandria Explore, a new **Explore** tab will appear in the **Alexandria Researcher** preferences window. This tab allows you to fully create and configure the **Explore** interface.

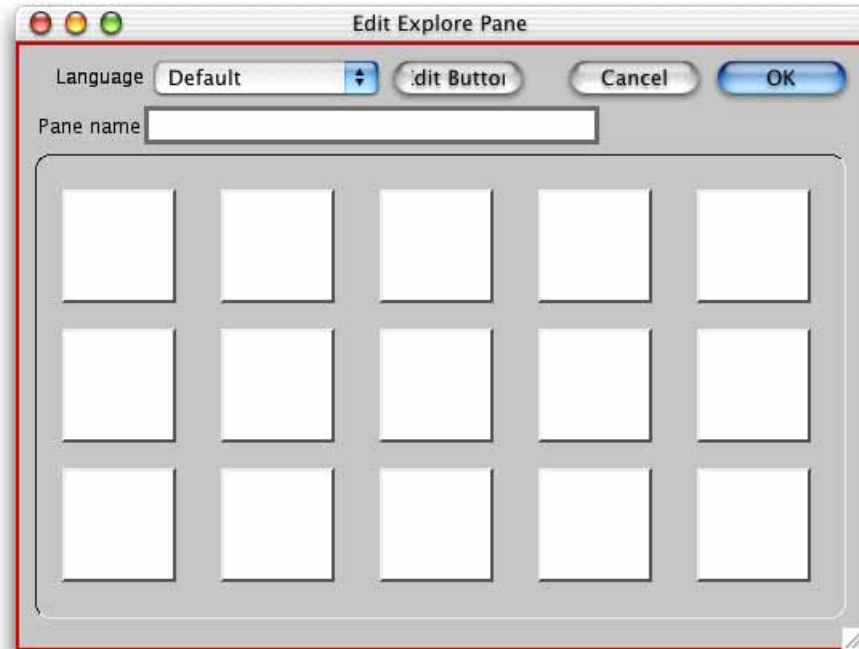


The **Explore** interface consists of panes that contain a number of iconic buttons. Each icon has an associated text label and action. The text label is shown below the icons and the action is performed when the icon is clicked by patrons.

When you license Alexandria Explore, you'll receive a fully pre-configured sample iconic interface with sample icons you may use to create your very own interface. To create an interface for your library you can:

- Remove the default pane set and start with a clean slate and build the entire interface from scratch by yourself.
- Use the default set as a starting point, then customize it to meet your library's specific needs.
- Import a ready-made pane set created by someone else.
- Import panes created by someone else, then use them to quickly configure your own custom interface.
- Do any combination of the above.

**Add Pane**—Create a new pane by clicking the **Add Pane** button. Enter a name for your new pane (required). The name can be changed later. If you are configuring your **Explore** interface for multiple languages, you'll need to provide a **Pane name** for each **Language** you are supporting. If you don't specify names for other languages, the name you've entered will be used as your **Default** language.

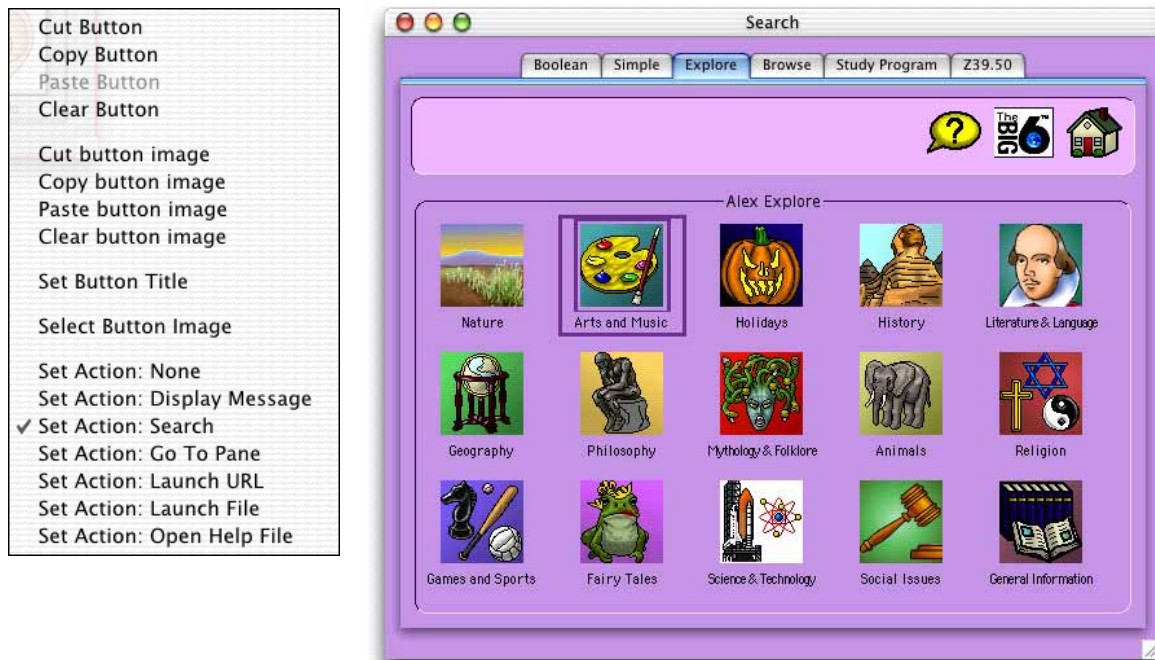


**Remove Pane**—This button deletes the selected pane.

**- N O T E -**

There is no *undo* for recovering deleted panes! You may want to use the **Export pane** button to archive panes for backup purposes.

**Edit Pane**—If you have an existing pane that you would like to edit, double-click on the pane name or click the **Edit Pane** button.



Click on a button to select it. To edit the button, double-click on it or click **Edit Button**. You can drag buttons to blank button locations. If there's another button at the destination location, the buttons will trade places. If you hold the <option> (Macintosh) or <ctrl> (Windows) key down during the drag, the button will be copied.

You can also modify buttons using contextual menus. Contextual menus (as shown to the left) let you perform all iconic-button commands. For Macintosh, hold the <ctrl> key down and click a mouse button; Windows users should click the right mouse button.

#### - N O T E -

An icon is the picture shown on a button. You can **Cut**, **Copy** and **Paste** icons. A button consists of an icon, a text label and an action. When you copy or move a button, these attributes move along with them.

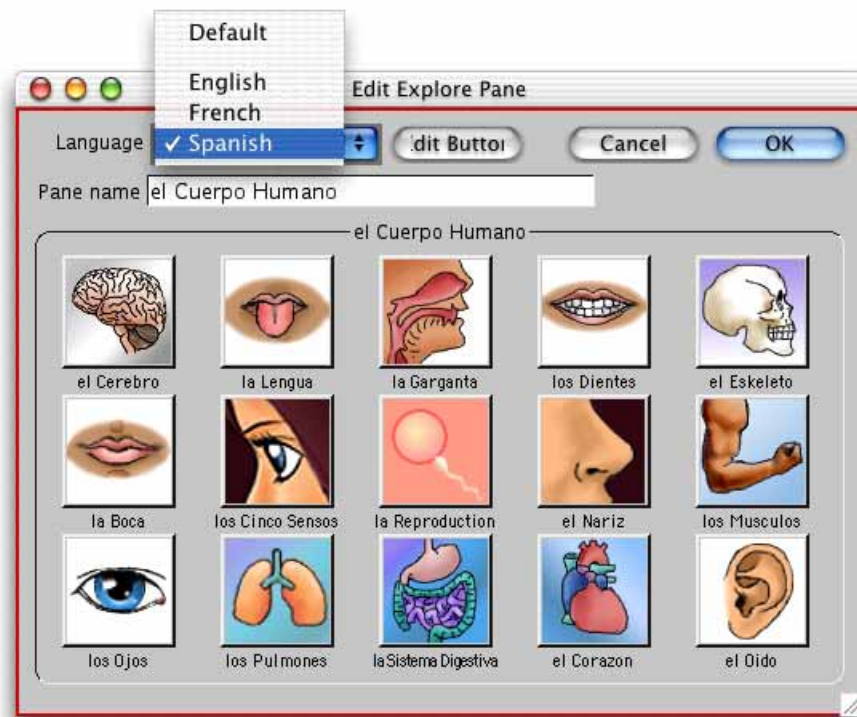
For convenience, you can drag, drop, or paste images directly onto buttons.

#### - H I N T -

When viewing panes, place the cursor over a button and wait for the tool tip to appear. The tool tip describes which action is performed when that button is clicked by library patrons. To force the tool tip to appear, use the <option> key (Macintosh) or the <ctrl> key (Windows).



To configure the pane for another language, select a language in the **Language** drop-down menu.



**- N O T E -**

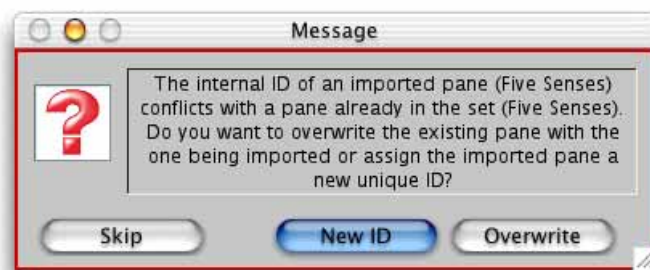
When you switch languages you can customize the **Pane Name** (the text label below a button), and the message for the **Display Message** action. If you don't provide a new label text in a new language, the **Default** language text label will be used.

Actions do *not* change per language.

**Set Default Pane**—When you click on this button, the currently selected (highlighted) pane will become the default pane. The default pane is always shown in bold. The default pane is the first pane shown when patrons use the **Explore** interface in an **Alexandria Researcher**.

- Cut Button
- Copy Button
- Paste Button
- Clear Button
- Cut button image
- Copy button image
- Paste button image
- Clear button image
- Set Button Title
- Select Button Image
- Set Action: None
- Set Action: Display Message
- ✓ Set Action: Search
- Set Action: Go To Pane
- Set Action: Launch URL
- Set Action: Launch File
- Set Action: Open Help File

**Import Pane**—Click this button to import an exported pane. A pane can also be imported by dragging and dropping it onto the **Panes** field. Each pane has a unique internal ID. If you are importing a pane with an ID that already exists, you'll get this message:



If you **Skip** the pane, it won't be imported. If you select **New ID**, the pane will be imported and assigned a new ID. If you select **Overwrite**, the imported pane will replace the existing pane with the same ID.

#### - N O T E -

Alexandria Explore uses the internal ID to link panes to one another. If you change a panes ID, existing panes won't be able to link. If you are building a new interface from pieces of others, it's worth checking each button to verify it's working correctly.

However, if you **Overwrite** a pane during import, all imported panes that are linked to the old ID are automatically updated.

**Export Pane**—Click this button to export the currently selected (highlighted) pane.

**Export All Panes**—Click this button to export the entire pane framework. The entire set of panes can be imported back into Alexandria using the **Import Pane** button, or by dragging the file to the **Panes** field. This is useful when configuring the Alexandria Explore interface for a large number of users (e.g. all libraries in your district). Create and configure the interface in one central location and share it with others by exporting the panes and then sending the export file ("\*.epm") to those who want to use your interface.

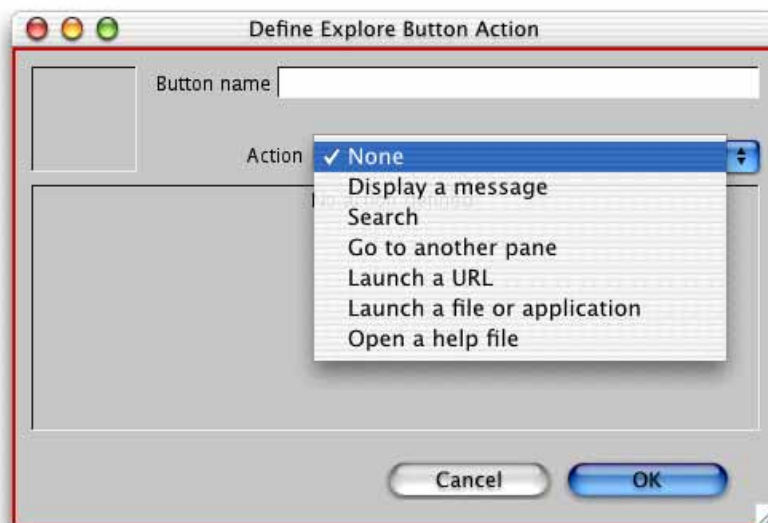
**Remove All Panes**—Clears the entire **Panes** field. Removes all traces of existing Alexandria Explore interfaces. This can not be undone, so take great consideration before using this button.

**Download Default Set**—Downloads COMPanion's pre-configured demonstration set of **Alexandria Explore** panes. You may use these as your default set, or rearrange and reconfigure them as you like.

Cut button image  
Copy button image  
Paste button image  
Clear button image

## Placing and configuring button

Each pane can hold a fixed number of button in a 5x3 grid pattern. An empty button is shown for each unused position on the grid. To edit a button, double-click it or select (highlight) it and click **Edit Button**.



The **Define Explore Button Action** window appears. Paste or drag a picture (image) into the icon holder field located on the top left-hand side of the window. If you enter text in the **Button name** field, it's shown directly below the icon in the pane.

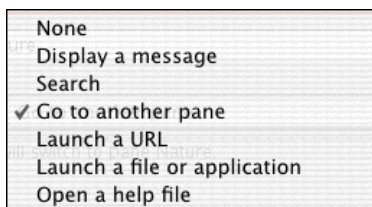
If you have a picture on your operating system standard clipboard, you can add an icon by clicking on the icon holder field and using **Paste** from under the **Edit** menu. Alternately, you can use the icon contextual menu, or drag and drop picture files onto the icon holder field.

When this button is clicked by your patrons, **Alexandria Explore** will perform the action you've selected from the **Action** drop-down menu.

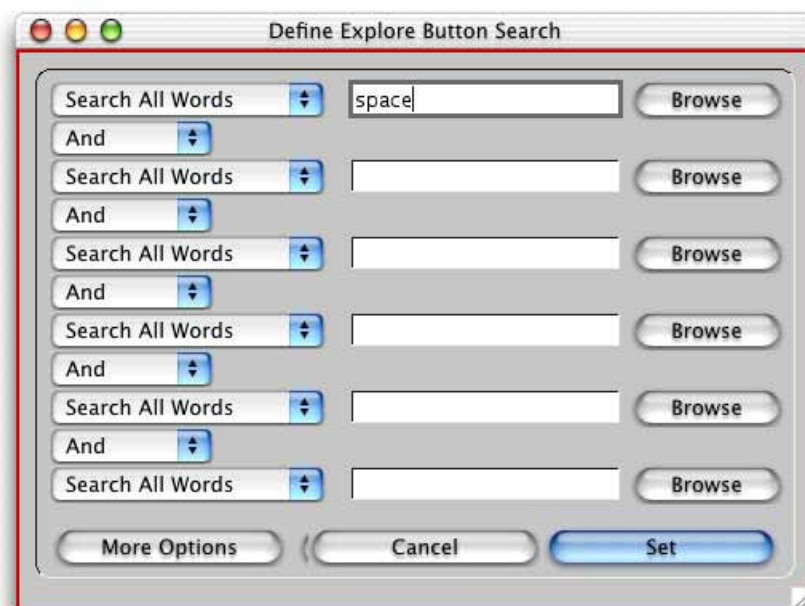
## Button Actions

**None**—No action is performed. The button does nothing. Nothing at all.

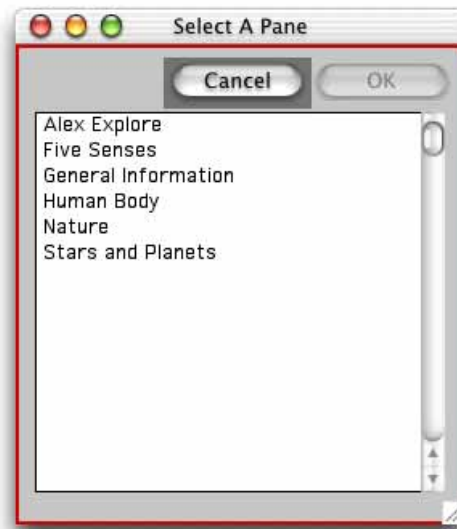
**Display a message**—The button will show a message in a **Query** window. Enter the message you want shown when this button is clicked.



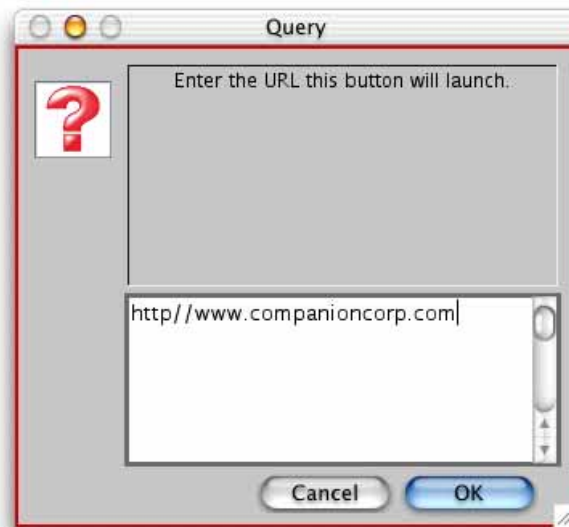
**Search**—The button will perform an Alexandria **Boolean** search. Specify your search criteria (see *"Boolean Search"* on page 286).



**Go to another pane**—The button causes Alexandria to link to another **Alexandria Explore** pane window.



**Launch a URL**—The button will open a specified website using your system's default internet browser.



**Launch a file or application**—The button will launch any specified file or application. Alexandria will open up a standard operating system **Browse/Explore** window, allowing the user to select the file or application desired for launch. On the Macintosh, if you are trying to open a file remotely using an **Alexandria Researcher**, it is *imperative* that the drive where the file is located be locally mounted.

**Open a help document**—The button will open an Alexandria help document if you select one from a list of currently installed help documents.

## Searching with Alexandria Explore

If you've purchased the **Alexandria Explore** option, your **Researcher** window will contain an additional **Explore** tab. Click this tab to view your default **Explore** pane.



To search using the **Alexandria Explore** interface, click on one of the icons. Some pictures will take you to new panes; others perform an Alexandria search. Some will open websites using your system's default web browser; others will open files on your local hard drive. The entire interface can be customized to meet the needs of your library.

When users are exploring panes beyond the default pane, they can navigate by using the **Back** button or return to the default pane window by clicking the **Home** icon.

# Alexandria WAN Searching

Use this chapter to learn how to search Alexandria collections using Alexandria WAN (wide-area network) access.

## - N O T E -

Alexandria WAN is an optional feature of Alexandria. You must have purchased a separate license to use this feature. If you have not purchased this option, Alexandria WAN capabilities will not be active in your system.

## Configuring your system for WAN access

With Alexandria WAN (wide-area network), you can access library collections on Data Stations connected through your network (district).

Below are general steps required to gain access to your remote Data Stations (see *"Installing Alexandria Clients"* on page 31).

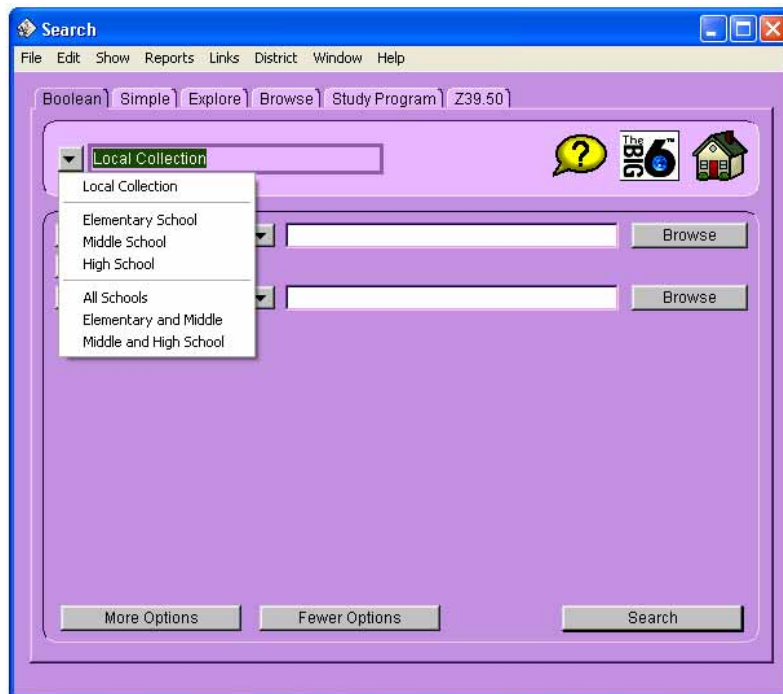
- Step 1. Create an address book that contains a list of IP addresses for machines running a Data Station that you wish to connect to (see *"Global Administration Preferences"* on page 72).
- Step 2. Configure Researcher Workstations preferences from the **Alexandria Research Preferences** window (see *"Alex Researcher Preferences"* on page 93).
- Step 3. Choose a Data Station from the **Researcher Workstation** or from a **Researcher** window (see *"The Researcher Window"* on page 281).
- Step 4. Perform a search (detailed in the following section).



## Alexandria WAN Searching

To perform a WAN search, do the following.

- Step 1. Select a particular collection (or location) to search from the drop-down menu located on the top left-hand side of the **Researcher** window.



In the example above, the first group of entries refers to individual collections (e.g. Elementary School, High School, and Middle School). If you **Search** one of these Data Stations, the results will look the same as searching the **Local Collection**.

- Step 2. If you've selected a group (e.g. All Schools, Elementary and Middle, Middle and High School) search, an intermediate results window (shown below) is displayed.
- Step 3. To view results for one of these collections in the list, double-click on the collection. An Alexandria result window will appear.
- Step 4. To examine the results from another collection, double-click on a different collection name.





## Z39.50 Client

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This chapter explains how to search collections using the Alexandria Z39.50 server interface.

**- N O T E -**

The Z39.50 server is an optional feature of Alexandria. You must purchase a separate license to use this feature.

### Configuring your system for Z39.50 access

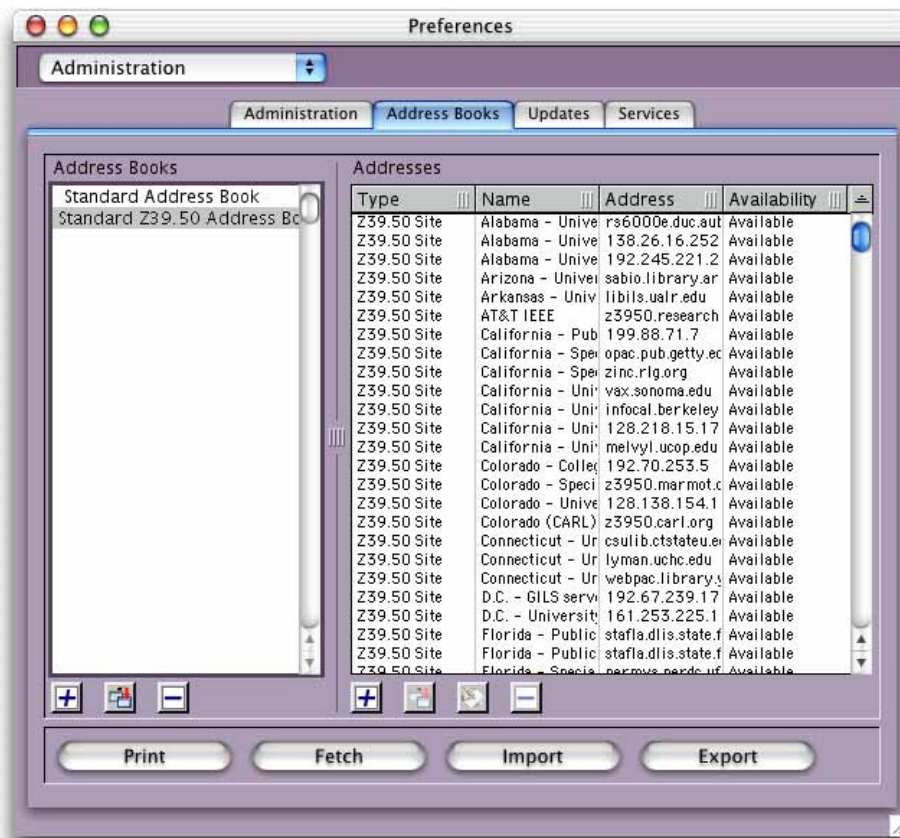
Z39.50 is an international standard for communication between computer libraries and information related systems. Z39.50 has become increasingly important to the development and deployment of interlinked library systems.

If you've purchased the Z39.50 server option, your Alexandria Data Station will accept Z39.50 queries from standard Z39.50 clients.

Below are the general steps required to gain access to Z39.50 servers.

1. Select **Preferences** from the **Edit** menu.
2. Once in the **Preferences** window, select the **Address Books** tab from under the **Administration** preference window.

3. If you've licensed use of Z39.50 servers, there will be a **Standard Z39.50 Address Book** selection in the top left field of the **Address Book** window. Click on it. When you click on it, a list of all available Z39.50 servers is displayed.



4. The following window appears, allowing you to select and edit individual Z39.50 servers or add an entirely new one.



5. If the Z39.50 server you are looking for is not displayed in the list, you may add it (if you know its access information) by clicking the **Add New** (“+”) button. For additional information on adding Z39.50 address books, see “Z39.50 Addresses” on page 76.

**NOTE:**

Use the TCP/IP address of your Data Station for your Z39.50 server address. Your Z39.50 server will use Port 210.

## Z39.50 Address Book

Below are your options for configuring a Z39.50 server. Remember that you need to **Save** after adding or changing information for each server. Click the **Revert** button to discard any changes you've made.

**Friendly Name**—The friendly name of the Z39.50 server; usually institution name and /or location.

**IP Address**—The IP address of the Z39.50 server. This field is required to connect to specific Z39.50 servers.

**Port**—Default is Port 210. Most Z39.50 servers require use of this port.

**Database**—The server directory location where Z39.50 files are stored. Default is usually "/"

**Username**—Some Z39.50 servers require an access username.

**Password**—Some Z39.50 servers require an access password.

**Availability**—Allows the user to determine whether they want this Z39.50 address to be available to everyone, hidden in any connected Researchers, or hidden everywhere altogether.

**Show in Z39.50 Server List**—This checkbox allows you to add a specific server to a quick-access server list located on the **Address Books** tab in the main **Preferences** window. The list appears as a drop-down menu located in the bottom-right corner of the window below the **Data Stations** field. This drop-down menu will remain blank until you add servers from the list.



# Orders, Vendors & Budgets

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This chapter describes how to use Alexandria's **Orders**, **Vendors**, and **Budgets** functions.

- **Orders**—You can easily order existing items and automatically add received items to your inventory.
- **Vendors**—You can create as many vendors as you need. As you process orders, Alexandria keeps track of how much you've ordered from each vendor.
- **Budgets**—You can create as many budget categories as you need. As you process orders, Alexandria keeps track of the remaining amounts in your various budgets.

The following sections provide overviews of how to use these functions in Alexandria.

Show	
Bulletin Board	
Patrons	Ctrl+L
Items	Ctrl+I
Circulation	Ctrl+T
Search	Ctrl+K
Dictionary	
Orders	
Budgets	
Vendors	
Subscriptions	
Routes	

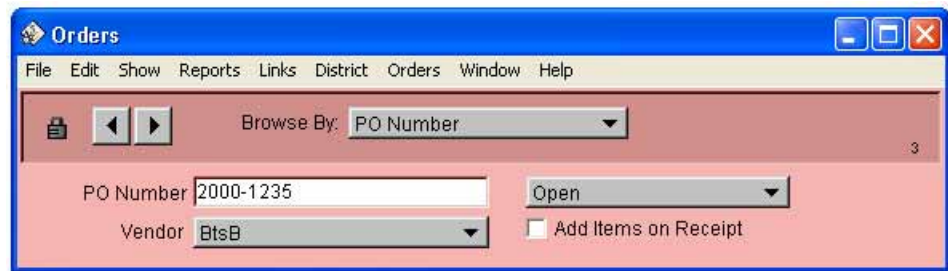
## Orders Management

Access the **Orders** window from under the **Show** menu. The **Orders** window (shown below) contains powerful features that help you quickly and easily manage ordering and budgeting.

The ordering process works like this:

- Step 1. Create a new **Order**. Its status is **Open**. Enter the items you want to order. You may have as many open orders as you like to help keep track of purchase requests.
- Step 2. Once you've completed an order, use the **Print** command from the **File** menu to print the current purchase order and mark it as **Issued**. When the order is issued, budgets are then **Committed** to the amounts on the purchase order. You cannot modify line items of issued orders.
- Step 3. Wait to receive your order. If the entire order arrives in one shipment, use the **Receive Entire Order** menu command. If you receive a partial order, receive each line item separately.
- Step 4. If you get impatient with your vendor, print a **Claim Letter** demanding that outstanding items be delivered on a timely basis.
- Step 5. If all the items in your order are received, the order is automatically **Closed**. However, if you believe that some items will *never* be received, you may *manually* **Close** the order. Items that are not received are removed from the **Budget** and **Vendor Total Purchases** calculations.

## Primary Orders Window Information



**Order Sequence Number**—Alexandria assigns a number in the order that you create new orders. It's displayed in the top right-hand side of the window and can *not* be modified by the user. In the window above, the sequence number is "3".

**PO Number**—Your **p**urchase **o**rders number can contain up to 25 alphanumeric characters. Use it to identify your orders.

**Vendor**—Use the **Vendor** field to select a vendor to order from. The vendor's address will be entered automatically into the **Order** tab. You may modify the vendor address if necessary. Add new vendors in **Vendor Management** (see "*Vendors Management*" on page 347).

**Order Status**—The order status is displayed in a drop-down menu to the right of the **PO Number** field. New orders have the status of **Open**. You may make changes to an **Open** order. Once the order has been printed or an item received, the status is automatically changed to **Issued**. **Issued** orders may not be modified except to receive items and adjust discounts or shipping charges. Once an order is complete, it's given the status of **Closed**. **Closed** orders can't be modified.

Orders can be removed manually using the **Orders** menu. When an order is **Closed**, it's assumed that any remaining items will never be received. The amounts are removed from the committed budgets.

You may change the status of a **Closed** order to **Issued** or **Open**. If you do this, your budgets are adjusted to reflect this change. If you haven't received any items of an order, its status may be reverted back to **Open** so that you can make changes. However, these types of changes should be done with great care, since the original order may have already been sent to the vendor.

Alexandria automatically keeps track of various statistics for you. As you add items to an order, your budgets are updated to reflect a commitment of funds. When an order is **Closed**, the spent amount is updated for the associated budget and is added to the vendor record to keep track of total purchases.

**Add Items on Receipt**—Click this box if you want Alexandria to automatically add items to the inventory when received. When items are added, you can assign them barcode numbers and other information. If you receive a diskette of MARC records for items purchased, *do not* check this option.

## Order

Click the **Order** tab to view or modify the vendor's address.

Bound to Stay Bound		Opened	Mar 27, 2001
Address		Issued	
Address 2		Closed	
Omaha	NE		93984
Country			

## Vendor Address

Enter the name of your vendor.

You must enter your vendor's address, city, state, postal code, and country. This data is used for purchase orders and other order information used in Alexandria.

**Opened**—Date the order was first created. You cannot modify this date.

**Issued**—Date the order was issued to the vendor. This date is set automatically when an **Open** order is printed. You can print an **Issued** or **Closed** order without modifying this date.

**Closed**—The date the order was **Closed**. If a **Closed** order's status was changed to **Issued** or **Opened**, when you **Close** it again, this date is updated with the new **Closed** date. A **Closed** order is considered complete. Any items that were not received are assumed to *never* be received and are removed from budgets and vendor totals.

## Notes

Click the **Notes** tab to enter notes about the order.

Notes to Vendor		Comments	

**Notes to Vendor**—These special instructions will be printed at the top of the purchase order. For example, "specify beginning barcode numbers" or "please close order after 90 days."

**Comments**—These notes are for library use only and are not printed on the purchase order. Use this field to make notes to yourself regarding this particular order.



## Summary

The **Summary** tab displays summary information about the order.

Summary		Line Items	
3 line items for this order			
Subtotal		\$27.83	
Shipping/Misc		\$2.78	
- Discount		\$0.00	
Tax		\$1.91	
Order Total		\$32.52	

Sales Tax %

**Subtotal**—The total amount of all the line items in your order. You can not modify this value.

**Shipping/Misc**—If additional costs are involved, enter them here.

**Discount**—If the order is discounted, enter the amount of the discount. This value will be subtracted from the Subtotal. If you want your discounts itemized, enter them as line items with negative costs.

**Sales Tax**—The sales tax rate charged. The rate from the **Order Preferences** window is automatically entered (see “Orders Preferences” on page 133). You may change it from order to order.

**Tax**—The Sales Tax on this order. Computed as:  $\text{Sales Tax\%} \times \text{Sub Total}$ .

**Order Total**—The total amount of the order. This is calculated as:  $\text{Sub Total} - \text{Discount} + \text{Shipping/Misc} + \text{Tax}$ .

## Order Budget Allocations

When an order status is changed from **Open** to **Issued**, the line item totals are **Committed** for each associated budget. Thus, if you have three items each worth \$30.00 on order from your Books budget, when the order is **Issued**, your Books budget committed value will increase by \$90.00 (3 x \$30).

When an order status has changed to **Closed**, budgets are updated using the following rules.

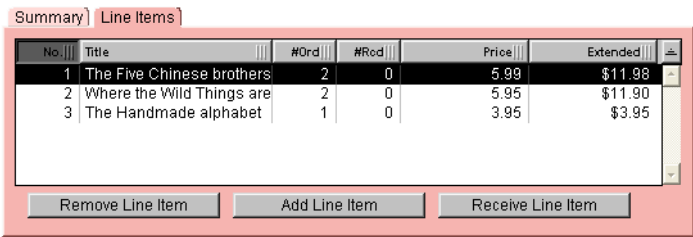
- Committed funds are removed.
- The subtotal is updated to match **Received Line** items *only*. Since you will not pay for unreceived items, they are removed from the total.
- A new **Order Total** is computed as:  $\text{Sub Total} - \text{Discount} + \text{Shipping/Misc} + \text{Tax}$ .
- Each received item’s cost is adjusted by the ratio **Order Total / Sub Total** and this value is recorded as **Spent** for each associated budget.

To summarize, when an order is issued, the line item costs associated with each budget are **Committed**. When an order is **Closed**, the cost for each received item is adjusted to reflect discounts, shipping costs and taxes *before* they are recorded as **Spent** in the appropriate budget category.

Orders	
First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Browse	Ctrl+B
Find	Ctrl+F
Unlock Record	Ctrl+U
New Order	Ctrl+N
Duplicate	Ctrl+D
Remove Order	Ctrl+R
New Line Item	Ctrl+Y
Modify Line Item	
Remove Line Item	
Receive Line Item	Ctrl+G
Receive Entire Order	

Line Items

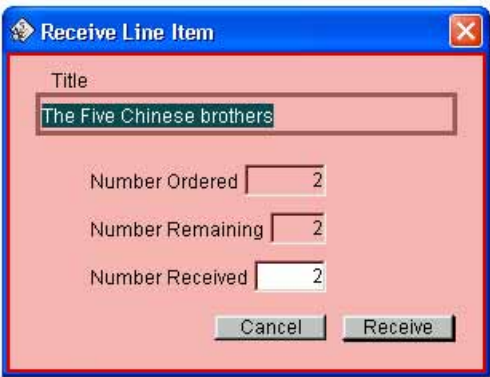
Click the **Line Items** tab to view information about particular line items on an order.



This tab is used to add, remove, receive, and examine ordered items. To view individual line item details, either double-click on the line or select the line and select (highlight) **Modify Line Item** from the **Orders** menu. Depending on the status of your order, certain commands may be disabled in the **Orders** menu. You can sort line items by the order they were created, or by title. Simply click on the corresponding column header to sort.

If the order is **Open**, you may use the **Remove Line Item** button to remove a selected (highlighted) line item. The **Add Line Item** button can be used to order another item. If the order is **Open** or **Issued**, you can use the **Receive Line Item** button to receive items from the order.

Other buttons won't be active because you can't modify an **Issued** order. If you receive an item from an **Open** order, its status is automatically set to **Issued**. If you make a mistake receiving a line item, Alexandria allows you to specify a negative **Quantity Received** to "undo" the receipt of items<sup>1</sup>. If the order is **Closed**, none of these buttons are active.



- S H O R T C U T -

If you hold down the <alt>(Windows)|<option>(Macintosh) key and select a line item, it will be recorded as received, just as if you clicked the **Receive Line Item** button!

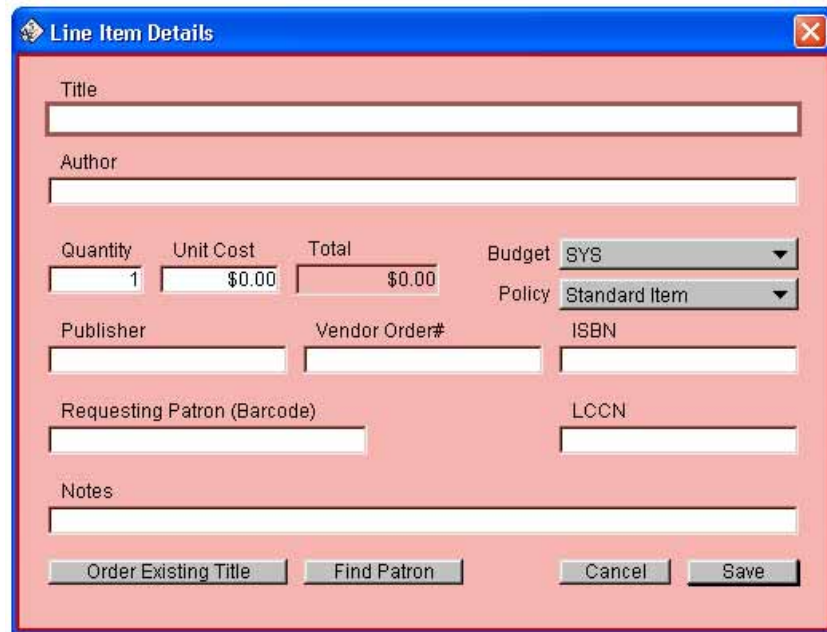
Once you've received an item, Alexandria will not allow you to modify or remove that line item. If you erroneously receive an item, you can receive a negative quantity to reverse the entry.

1. You can only *unreceive* as many items as you have already received. Therefore, if you receive 10 of the 15 items and then discover an erroneous entry, you can receive "negative 10" of these items to *undo* the erroneously recorded receipt.

## Line Item Details

When an order is **Open**, double-click an item from the **Line Items** tab to view that item's details.

This window is used to enter information for each item of your order. Except for the title, the rest of the fields can be filled in optionally.



The screenshot shows a window titled "Line Item Details" with a blue title bar and a red close button. The window has a pink background and contains the following fields and controls:

- Title:** A large text input field.
- Author:** A text input field.
- Quantity:** A text input field with the value "1".
- Unit Cost:** A text input field with the value "\$0.00".
- Total:** A text input field with the value "\$0.00".
- Budget:** A dropdown menu with "SYS" selected.
- Policy:** A dropdown menu with "Standard Item" selected.
- Publisher:** A text input field.
- Vendor Order#:** A text input field.
- ISBN:** A text input field.
- Requesting Patron (Barcode):** A text input field.
- LCCN:** A text input field.
- Notes:** A text input field.
- Buttons:** "Order Existing Title", "Find Patron", "Cancel", and "Save".

If you want to order a second copy of an item in your collection, use the **Order Existing Title** button to locate the item you wish to order. Alexandria brings up the **Item Lookup by Title** window used to locate titles you want to order. Alexandria then automatically fills in most of the information in this window. You should always use this technique when you are ordering duplicate copies of items in your collection. This way, Alexandria knows you've ordered multiple copies and can add new item information correctly when it's received.

When you add a new item to an order, you can specify the following information:

**Title**—Enter the title of the ordered item. You must enter something in this field, otherwise vendors won't know what you're ordering. As you <tab> out of this field, Alexandria checks your local database, and if the title already exists, assumes you are adding additional copies to your library. You can also locate existing titles by using the **Order Existing Title** button.

**Author**—Enter the author of the ordered item.

**Quantity**—The number of copies you're ordering. Default is one.

**Unit Cost**—The cost of each individual copy.

**Total**—Cost of all copies (as computed by Alexandria). You can't modify this number.

**Budget**—Select the budget code you want for this line item purchase.

**Policy**—The policy code for this item once it's added to the collection. The **Standard** policy is automatically selected. You may select any policy from the policy drop-down menu.

**Publisher**—This field is used to enter the publisher of this item.

**Vendor's Order #**—The vendor order number for the item you're ordering.

**ISBN**—The International Standard Book Number. Many vendors use this number for ordering purposes; however, it's optional for your ordering purposes.

**LCCN**—The Library of Congress Control Number. Some vendors use this number for ordering purposes; however, it's optional for your ordering purposes.

**Requesting Patron**—If there is one, enter the barcode number of the requesting patron. When the order is received, Alexandria will print a receipt letter (*see "Letters Tab" on page 135 and "Patron Receipt Letter" on page 449*) for the patron, informing them that the library has received their item. If the item is placed into inventory, the system will automatically place an in-stock-hold on that specific item for the requesting patron. If you don't know the barcode of the patron, you can use the **Find Patron** button to search for the patron.

**Notes**—Comments for the line item. These are *not* printed on the order. The librarian uses these for additional information.

### Receiving Your Order

If you checked **Add Items on Receipt** in the **Order Entry** window, Alexandria will automatically open the **Items** management window so you can add additional information for received titles. If you don't want to add the item shown, click the **Cancel** button rather than **OK**.

If you don't check the **Add Items on Receipt** option, received items are not added into Alexandria's inventory.

#### W A R N I N G !

If you are receiving MARC records for these items, add them via import routines rather than this window (see *"Data Import and Export"* on page 495).

If you are receiving an entire order, this window will appear for each title in the order. If you click **Cancel**, you'll only be cancelling the addition of the current title, the other titles will still remain active. If you realize that you made some mistakes after the order has already been received, you can use the **Items** management window to modify the information you've entered.

If you are receiving an order for a title that already exists in your collection, the **Items** management window will appear with the existing title selected and Alexandria will automatically add the newly received item as another copy.

The vendor will be automatically entered into each copy, so it's not necessary to specify in this window. Alexandria automatically places the **Order Price** as the item's **Cost**.

Orders	
First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Browse	Ctrl+B
Find	Ctrl+F
Unlock Record	Ctrl+U
New Order	Ctrl+N
Duplicate	Ctrl+D
Remove Order	Ctrl+R
New Line Item	Ctrl+Y
Modify Line Item	
Remove Line Item	
Receive Line Item	Ctrl+G
Receive Entire Order	

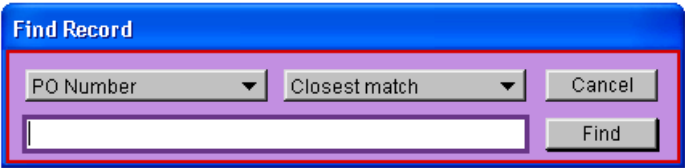
Orders Menu

The **Orders** menu at the top of this window includes commands to browse through your orders and to add or remove orders.

See page 49 for information about the browsing commands: **First**, **Previous**, **Next** and **Last**.

**Browse**—Brings up the **Browse Orders** window.

**Find**—Brings up the **Find Record** window so users can locate specific order records.



**Unlock/Lock Record**—Toggles between unlocking and locking the current record for modification.

**New Order**—Select this command to create a new order.

**Duplicate**—Select this command to duplicate an existing order. This is a *very* useful command. For example, if you want to split one order into several, duplicate it and then remove any line items you don’t want from each order.

**Remove Order**—Select this command to remove an entire order. If the order is within the current financial year, budget and vendor statistics are immediately updated. In general, for more accurate reporting, you should only remove orders outside the current financial year.

**New Line Item**—Select this command to add a new line item to an order.

**Modify Line Items**—Select this command to modify a selected line item. Performs the same action as double-clicking on a line item.

**Remove Line Item**—Select this command to remove a selected line item.

**Receive Line Item**—Select this command to receive the selected line item.

**Receive Entire Order**—Select this command to receive all items in a current order.

<b>Show</b>	
Bulletin Board	
Patrons	Ctrl+L
Items	Ctrl+I
Circulation	Ctrl+T
Search	Ctrl+K
Dictionary	
Orders	
Budgets	
Vendors	
Subscriptions	
Routes	

## Vendors Management

Under the **Show** menu, access the **Vendors** window for managing vendor records. You can setup as many different vendors as you require.

The screenshot shows the 'Vendors' window with a menu bar (File, Edit, Show, Reports, Links, District, Vendors, Window, Help) and a toolbar with navigation buttons. The 'Browse By' dropdown is set to 'Vendor Code'. The 'Vendor Code' field contains 'COMPAnion'. The form displays the following information:

- Company Name: COMPAnion Corporation
- Address: (empty field)
- Address 2: (empty field)
- City: (empty field) State: (empty field) Postal Code: (empty field)
- Country: (empty field)
- Status: Active (dropdown menu)
- Start Date: Feb 3, 2000
- Purchases: \$0.00
- Recompute button

Below the main form is a 'Contact Info' section with fields for Contact Name, Title, Phone, Fax, and Email, all of which are currently empty.

### Primary Information

A Vendor record consists of the following information:

**Vendor Sequence Number**—Alexandria assigns this number in the order that you create new Vendors. It's displayed in the top right side of the window and cannot be modified by the user.

**Vendor Code**—Enter a short name for this vendor. This is the name that is displayed in drop-down menus throughout the system for the selection of vendors. Vendor codes must be unique; that is, they may not be repeated for other vendors.

**Company Name**—The full name of the vendor company.

**Address**—The vendor order street address. This is the address that all P.O.s are addressed to.

**City**—The city where the vendor is located.

**State**—The state or province where the vendor is located.

**Postal Code**—The vendor's postal code.

**Country**—The country where the vendor is located.

**Status**—Vendors that you are currently using should have an **Active** status. If a vendor has an **Inactive** status, its code will not be displayed in any of the vendor selection drop-down menus used in the system. Note: you won't be able to refer back to this vendor record except for this window.

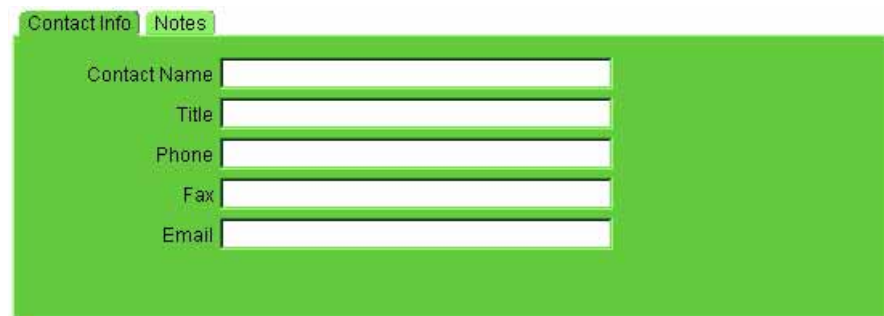
**Start Date**—The date from which the **Purchases** value is computed. When you first add a vendor, this contains the date they were added. However, should you ever clear vendor purchase statistics, this date will be reset to the date the purchase statistics were cleared.

**Purchases**—The dollar amount of the completed (i.e. **Closed**) purchases (using the **Closed** date) since the **Start Date**. You can not modify this field except by using the **Recompute** button or placing orders. Thus, when an order is **Closed**, and its **Closed** date is **AFTER** the purchased **Start Date**, the received total is added to the Vendor **Purchases** total.

Use the **Recompute** button to force Alexandria to examine all **Closed** orders for this Vendor and total the values since the **Start Date**. Typically these calculations are performed automatically as orders are added or removed—and when the Start Date value is changed. However, in the event that these calculations could be wrong, the **Recompute** button forces Alexandria to compute new values.

## Contact Info

This tab contains information about the person to contact at the Vendor site.



**Contact Name**—The name of your contact person.

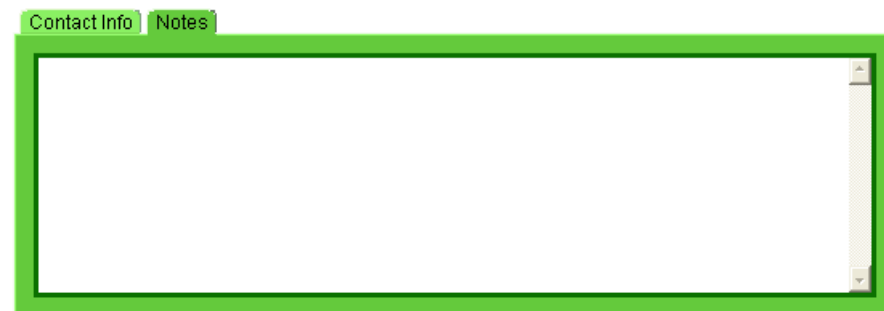
**Title**—The title of your contact person.

**Phone**—The contact person's phone number.

**Fax**—The contact person's fax number.

**Email**—The contact person's email address.

## Notes



This tab contains additional vendor information. Enter as much information as necessary regarding the salespeople, managers, product quality, specialization, and ordering information.



## Vendors

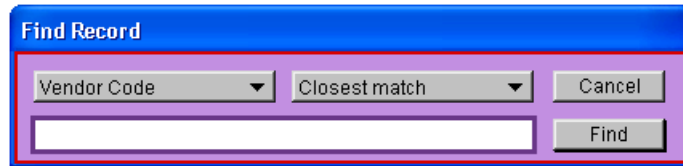
First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Browse	Ctrl+B
Find	Ctrl+F
Unlock Record	Ctrl+U
New Vendor	Ctrl+N
Duplicate	Ctrl+D
Remove Vendor	Ctrl+R

## Vendor Commands

The **Vendors** menu at the top of the window includes commands to browse through your vendors and to add or remove them.<sup>1</sup>

**Browse**—Brings up the **Browse Vendors** window.

**Find**—Brings up the Find window so the user can locate a specific vendor record.



**Unlock Record**—Unlocks the current record for modification.

**New Vendor**—Select this command to add a new vendor.

**Duplicate**—Select this command to add a new vendor based upon the same information from the current vendor. Note: **Start Date** and **Purchases** will not be copied.

**Remove Vendor**—Select this command to remove an existing vendor. Vendors that are used by Order or Subscription records can not be removed.

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1. See page 49 for information about the browsing commands: First, Previous, Next and Last.

**Show**

Bulletin Board

Patrons Ctrl+L

Items Ctrl+I

Circulation Ctrl+T

Search Ctrl+K

Dictionary

Orders

Budgets

Vendors

Subscriptions

Routes

## Budgets Management

Under the **Show** menu access the **Budget** window. This window is used to manage budget records. You can select as many different budget categories as you require for your library. The total library budget is always displayed at the bottom of the window for reference purposes.

Amount	Committed	Spent	Balance
\$1,500.00	\$3.95	\$0.00	\$1,496.05
0.00%	0.26%	0.00%	99.73%

Total Amount	Total Committed	Total Spent	Total Balance
\$0.00	\$27.83	\$0.00	-\$27.83
0.00%	0.00%	0.00%	0.00%

Recalculate All Budgets

Budget records consist of the following information:

**Budget Sequence Number**—Alexandria assigns this number in the order that you create new Budgets. It's displayed in the top right side of the window and can not be modified by the user.

**Budget Code**—Enter a short name for the budget. This is the name that is displayed in drop-down menus throughout the system for the selection of budgets. Budget codes must be unique; that is, they may not be repeated for other budgets.

**Budget Name**—A full description of the budget. For example, if money comes from an individual, enter the individual's name here. If the money comes from the general fund, type in "General Fund".

**Status**—Budgets that you are currently using should have an **Active** status. If a budget has an **Inactive** field status, its code will not be displayed in any of the budget selection drop-down menus used (i.e. you won't be able to refer to this budget record).

## Notes Tab

Enter any comments or notes regarding the budget entry.

Budget | Notes

The system budget code is required by the system. Alexandria will allocate all the shipping and miscellaneous charge to this budget code. You may change the description and the budget amount.

## Budget Details

Budget | Notes

Amount	Committed	Spent	Balance
\$0.00	\$0.00	\$0.00	\$0.00
0.00%	0.00%	0.00%	0.00%

**Budget Amount**—The total dollar amount budgeted for code. The percentage displayed below this number represents the portion of the total library budget that this entry uses.

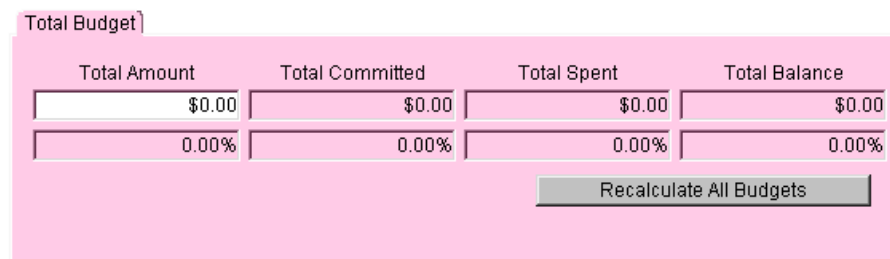
**Committed**—The total dollar amount of the current budget committed. Money is committed when purchase orders are **Issued**. This number cannot be modified from this window. The percentage displayed below it is the percentage of its budget that is currently Committed.

**Spent**—The total dollar amount of the budget that has been spent. When an order is **Closed**, all the committed values for received items from this order are moved to Spent. This number cannot be modified from this window. The percentage displayed below it is the percentage of its budget that is currently Spent.

**Balance**—The remaining amount in the budget category. It's computed by taking the budget amount minus the amount committed and spent. The percentage displayed below it is the percentage of the budget remaining (*for more details on how these values are computed, (see "Order Budget Allocations" on page 341)*).

## Total Budget

The total budget for your library is displayed at the bottom of the budget window. Typically, your library budget is set once—but can be changed at any time.



Total Amount	Total Committed	Total Spent	Total Balance
\$0.00	\$0.00	\$0.00	\$0.00
0.00%	0.00%	0.00%	0.00%

Recalculate All Budgets

The Total Budget tab includes the following information.

**Total Budget**—The total dollar amount of the library budget. You may change this value at any time. The percentage displayed below is the percentage of budget that is currently allocated to budget categories.

**Total Committed**—The total dollar amount committed by all purchase orders. This amount is automatically updated as purchase orders are **Issued**. This number cannot be modified from this window. The number displayed below is the percentage of your total budget that is currently **Committed**.

**Total Spent**—The total dollar amount spent. This amount is automatically updated as purchase orders are **Closed**. This number cannot be modified from this window. The percentage displayed below this is the percentage of your total budget that is currently **Spent**.

**Total Balance**—The remaining amount in the library budget. It's computed by taking the library budget minus the amount committed and spent. The percentage displayed below is the percentage of the total budget that is currently remaining.

Click on the **Recalculate All Budgets** button to force Alexandria to rebuild all budget values from orders within the specific financial year (see “Orders Preferences” on page 133). Typically, budget calculations are automatically updated as orders are added, modified or removed. However, in the event that these values are wrong, this button forces a recomputation of all values.

## Budgets

First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Browse	Ctrl+B
Find	Ctrl+F

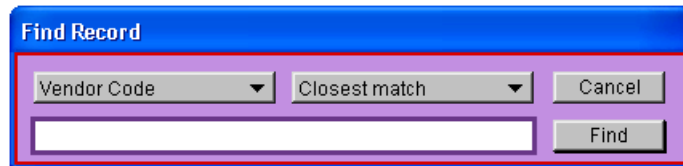
Unlock Record	Ctrl+U
New Budget	Ctrl+N
Duplicate	Ctrl+D
Remove Budget	Ctrl+R

## Budget Commands

The **Budgets** menu at the top of the window includes commands to browse through your budgets and to add or remove budgets.<sup>1</sup>

**Browse**—Brings up the **Browse Budgets** window.

**Find**—Brings up the Find window so that the user can locate a specific Budget record.



**Unlock Record**—Unlocks the current record for modification.

**New Budget**—Select this command to add a new budget.

**Duplicate**—Select this command to add a new budget based upon information from the current budget. **Committed** and **Spent** balances will not be copied.

**Remove Budget**—Select this command to remove an existing budget. Budgets that are used by existing Subscription or Order records can not be removed.

1. See page 47 for information about the browsing commands: First, Previous, Next and Last.



# Subscriptions & Routes

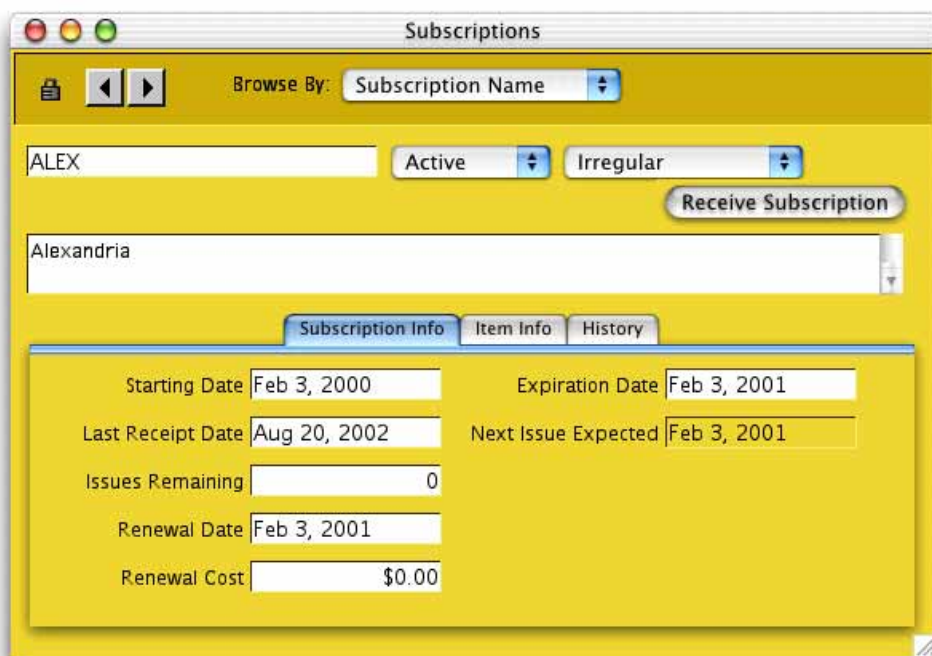
Most libraries have subscriptions to periodicals. Alexandria's subscription management abilities help keep track of your library's subscriptions—including their cost, frequency, and location.

## Subscriptions Management

From the **Show** menu, select **Subscriptions**. The **Subscriptions** window is used to keep track of subscriptions for your library.

When a subscription is received, Alexandria records it; if you've selected **Inventory on Receipt**, Alexandria automatically adds the item to your current inventory and automatically prints a routing slip for the item.

Every time an item is received, Alexandria reduces the number of issues remaining and keeps the receipt in the subscription's history. You can confirm receipts for all issues by examining the **History** tab.



Subscriptions	
First	⇧⌘[
Previous	⌘[
Next	⌘]
Last	⇧⌘]
Browse	⌘B
Find	⌘F
Clear History	
Add New History Item	
Lock Record	⌘U
New Subscription	⌘N
Duplicate	⌘D
Remove...	⌘R

## Subscriptions Primary Information

Daily
Weekdays Only
Sat & Sun Only
Weekly
Biweekly
Monthly
Bimonthly
Quarterly
Semiannually
Annually
✓ Irregular

**Subscription Code**—Enter a short name for the subscription. If you receive more than one copy of a particular subscription, number each one. For example, if you receive two subscriptions of *National Geographic*, number them “NGeo1” and “NGeo2”. This code is used by Alexandria when selecting subscriptions. Subscription codes must be unique.

**Subscription Description**—This field contains the full description for the subscription. The librarian may enter additional information regarding the subscription. This information is used as the initial title when you inventory.

**Frequency**—Use this drop-down menu to select the subscription’s frequency. Default is **Irregular**.

**Receive Subscription**—Click this button to receive your subscription. Typically, you’ll receive subscriptions from the **Circulation** window; this control is only available for convenience (see “Receive Subscription” on page 267 for more information).



## Subscription Info

The **Subscription Info** tab contains general information about the subscription.

Subscription Info		Item Info	History
Starting Date	Feb 3, 2000	Expiration Date	Feb 3, 2001
Last Receipt Date	Aug 20, 2002	Next Issue Expected	Feb 3, 2001
Issues Remaining	0		
Renewal Date	Feb 3, 2001		
Renewal Cost	\$0.00		

**Starting Date**—Enter the starting date of the subscription here. This information is used solely for your reference; it is not used by Alexandria for any reports or calculations.

**Last Receipt Date**—This field displays the date the last issue was received. This is updated when the “Receive Subscription” command is used. Alexandria uses this date to determine if an issue is past due.

**Issues Remaining**—This field contains the number of issues remaining in the subscription. As you receive issues, this number decreases to reflect the correct number of issues remaining. If you renew a subscription early, add the number of issues purchased to the **Issues Remaining** number.

**Renewal Date**—Enter the date that you renew your subscription. Alexandria uses this date in reports as a reminder of when subscriptions need to be renewed.

**Renewal Cost**—Enter the cost of subscription renewal. Use this cost to help manage library budgets. This information is used solely for your reference and is not used by Alexandria for any calculations.

**Expiration Date**—Enter the date the subscription expires. This information is used solely for your reference; it is not used by Alexandria for any reports or calculations.

**Next Issue Expected**—This field contains a date based on your subscription frequency and determines when your next issue is expected. This information is used solely for your reference; it is not used by Alexandria for any calculations.



### NOTE:

The **Last Receipt Date** is most likely *not* the same as the issue date of the item.

## Item Info

Click the **Item Info** tab to view more information about a particular subscription item.

The screenshot shows the 'Item Info' tab selected. The form contains the following fields and values:

- Library: [Empty text box]
- Location: [Empty text box]
- ISBN/ISSN: [Empty text box]
- Cost: \$0.00
- Policy: Standard Item (dropdown menu)
- Vendor: PermaBound (dropdown menu)
- Route: None (dropdown menu)
- TOC Route: None (dropdown menu)
- Medium: book (dropdown menu)
- ☐ Inventory on Receipt

**Library**—When an issue is received, it is assigned this library code.

**Location**—When an issue is received, it is assigned this location code.

**ISBN / ISSN**—Enter the ISBN or ISSN for the periodical here. This information is used solely for librarian reference and is not used by Alexandria for any calculations.

**Cost**—When an issue is received, you can assign a default replacement cost.

**Inventory on Receipt**—When this box is checked, Alexandria will ask to add the received item to inventory. If you don't have this box marked, received items are not automatically inventoried when they are received. Many libraries don't inventory high frequency items. Instead, they use the temporary item check out capability. Alexandria will automatically place the receipt after the subscription name when the new record is added.

**Policy**—Use this drop-down menu to select which policy will be assigned to an issue when it's received.

**Vendor**—Use this drop-down menu to select the vendor from which the subscription was received. Use it to order and renew subscriptions. If you don't want to track the vendor, select **None**. If you wish to add a new vendor, select **Add New Vendor** from the drop-down menu and a window appears from which you can add new vendors to your system.

**Route**—Select the routing slip you want printed when the issue is received. If you don't want a routing slip printed, select **None**. The issue is automatically checked out to the **Route's Responsible Patron** when the routing slip is printed.

**TOC Route**—Prints a **Table of Contents** routing slip when an issue is received. This is used to attach a photocopy of the items **Table of Contents** (or for any other purpose the library would need a routing slip). It's assumed that the item isn't circulating, so the item is not checked out to the **Responsible Patron**.

**Medium**—Medium code to assign to this record.



### NOTE:

The **Policy** can only be changed after the item is received.

## History

Click the **History** tab to view the subscription's receipt history. The receipts are listed with the most current at the top of the list.



**History** information includes the date received, the Alexandria user who received it, and the number of remaining issues. To edit the history, double-click on the history line item entry to change.

You can clear history lines by selecting them and pressing the <delete> key on the keyboard. Use the **Clear History** button to clear all **History** lines. Alexandria will ask if you are sure that you want to delete the selected history before doing so.

Clicking on the **Add New History Item** button allows you to add a new history note to the subscription. These special notes can encompass anything from "Sent claim letter about missing subscriptions" to "talked with district manager about reduced pricing if we purchase two subscriptions."

You may also right-click (Windows) or <ctrl>-click (Macintosh) in the subscription history field to select the **Add New History Item** option.

Show	
Bulletin Board	
Patrons	⌘L
Items	⌘I
Circulation	⌘T
Search	⌘K
Dictionary	
Orders	
Budgets	
Vendors	
Subscriptions	
Routes	

## Routes Management

Select **Routes** from under the **Show** menu to access the **Routes** window, used for managing routing records. You can add as many routes as required for your library. Routing lists are used to direct items (supplied by the library) to a specified list of readers.

At times, librarians will need to route items to a number of different patrons. Alexandria's **Routing List Manager** helps librarians keep track of these various lists. Every routing list has a responsible patron associated with it. When items are routed, Alexandria checks the item out to this responsible patron. Routes are also assigned a *routing period*, a time period that librarians expects the item to be circulating before it's returned to the library.

Routes contain a *routing list*, which includes names and addresses of patrons on the route list. An **Instructions** tab is included so that the librarian can enter additional instructions for the route.

Routes can be assigned to subscriptions so that they are issued when subscriptions are received. However, any collection item can be routed using the **Circulation** window "Issue Routing Slip" on page 272).

Routes

Browse By: Route Name

Route Name: Default Route

Responsible Patron: 3 **Lookup**

For Library Use

Route Period: 14

Route List Instructions

Patron	Location
--------	----------

Remove Patron Add Manual Entry Find/Add Patron

Routes	
First	⇧⌘[
Previous	⌘[
Next	⌘]
Last	⇧⌘]
Browse	⌘B
Find	⌘F
Unlock Record	⌘U
New Route	⌘N
Duplicate	⌘D
Remove...	⌘R
Add Manual Entry	⌘M
Find/Add Patron	⌘Y

## Routes Primary Information

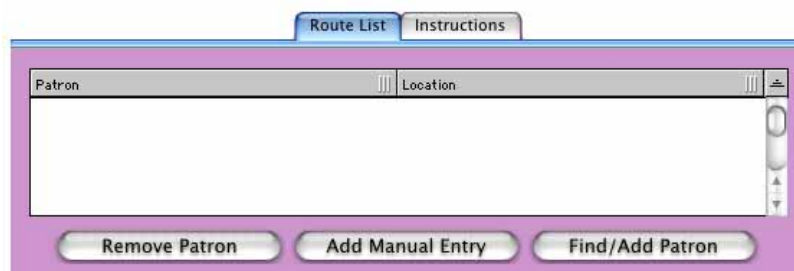
The top section of the **Routes** window consists of the following information:

**Route Name**—The friendly name you’ve selected for this route.

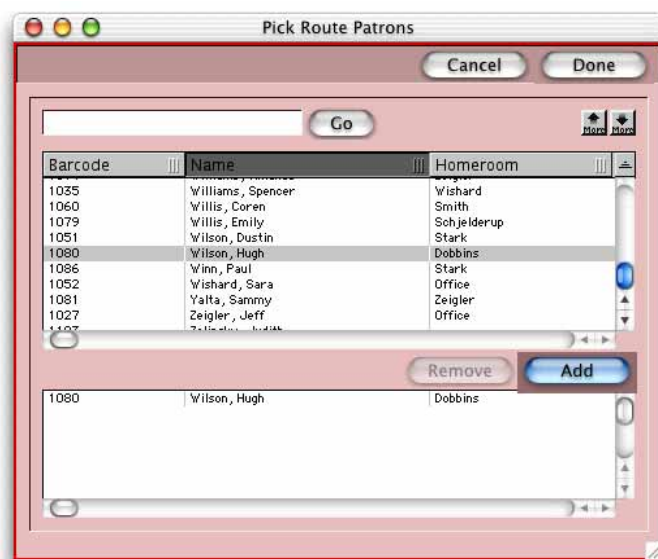
**Responsible Patron**—The **Responsible Patron** is the barcode number of the patron responsible for this route. When an item is distributed, it’s checked out to the **Responsible Patron**. Default is **For Library Use Patron (barcode 3)**; however, items routed with this patron will be filtered off all reports unless explicitly requested. Use the **Lookup** button to locate patron barcodes based on their names.

**Routing Period**—The **Routing Period** is used to compute a due date for the route. If something that is routed is not returned to the library, it is reported as an overdue item for the **Responsible Patron**.

## Route List



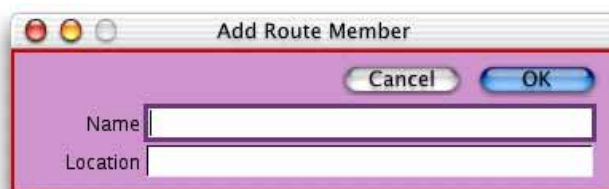
Click the **Route List** tab to view and edit the list of patrons on the route list. Use the **Find / Add Patron** button to add patrons to the route list. When you click this button, the **Pick Route Patrons** window appears. Double-click on a patron in the list or select (highlight) them and click on the **Add** button to add them to the route list. As you add patrons, they appear in the bottom of this window. When you have finished, click the **Done** button to add all the selected patrons to the routing list.



Once added, you can remove patrons from the routing list by selecting (highlighting) them and pressing the <delete> key, or clicking the **Remove** button.

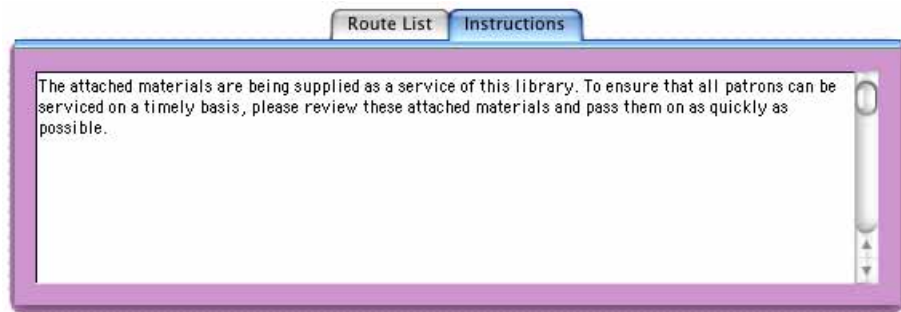
To add a patron who is not in the Alexandria system, use the **Add Manual Entry** button.

The **Add Route Member** window will appear. Specify a patron **Name** and **Location**. The new patron will appear in the **Route List**.



## Route Instructions

Use the **Instructions** tab to add special instructions to your routes. Instructions are printed at the top of the route form.

The image shows a software interface for adding route instructions. At the top, there are two tabs: "Route List" and "Instructions", with "Instructions" being the active tab. Below the tabs is a large rectangular text area with a light blue border. Inside this area, the following text is displayed: "The attached materials are being supplied as a service of this library. To ensure that all patrons can be serviced on a timely basis, please review these attached materials and pass them on as quickly as possible." To the right of the text area is a vertical scrollbar.

Routing forms are automatically printed when the library receives a subscription with a specified route. However, you can print the current form at any time by selecting **Print** from the **File** menu. If you want to print more than one routing list, use **Subscription Reports** from the **Reports** menu.





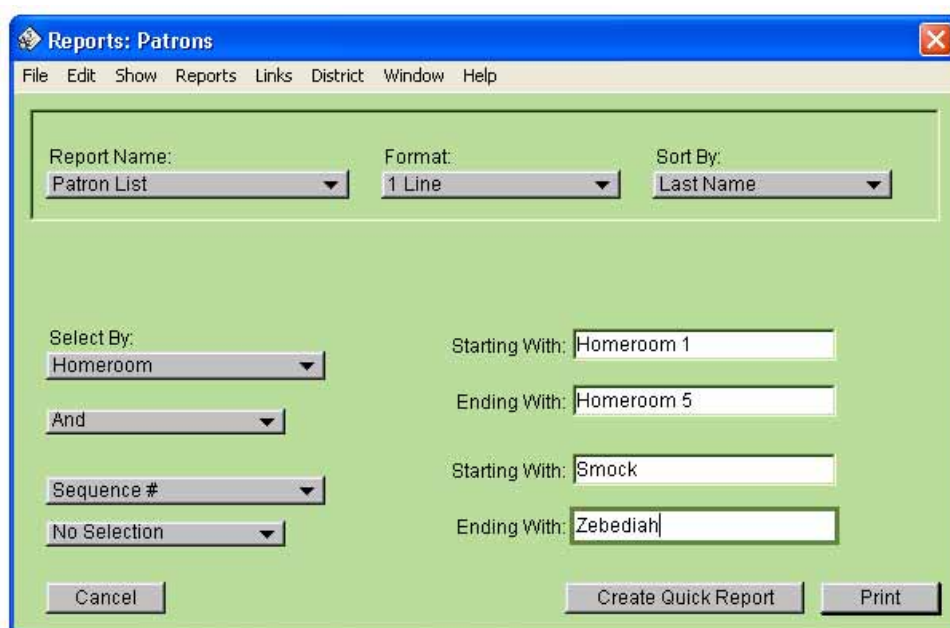
# Introduction to Reports

Alexandria provides a simple-to-use interface to generate hundreds of reports for nearly all data saved within the program.

This chapter provides an overview of the report preparation process and instructions on how to create and use **Quick Reports**. For specific report information, please review the subsequent chapters.

## How to Create a Report

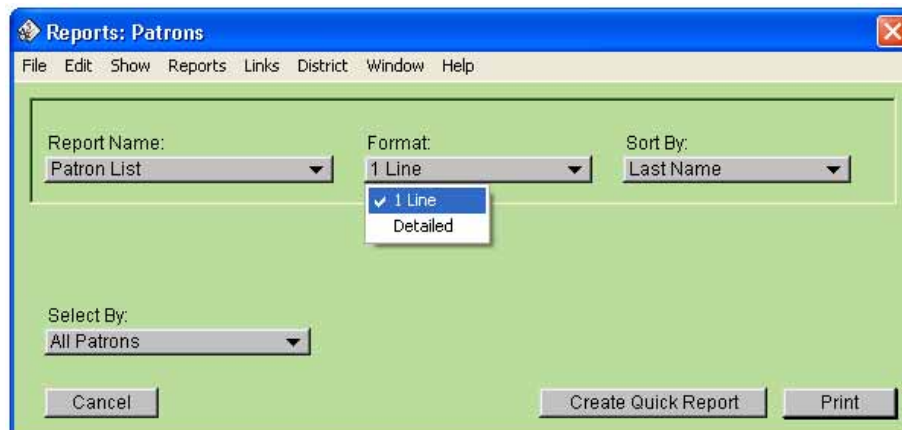
To generate a customized report in Alexandria, choose the report type you want from the **Reports** menu. In the example below, **Patron Reports** was selected from the **Reports** menu. This sample shows a generalized form of the report window for all types of reports. The specific fields and drop-down menus on every report window vary depending on the report and format you have selected.



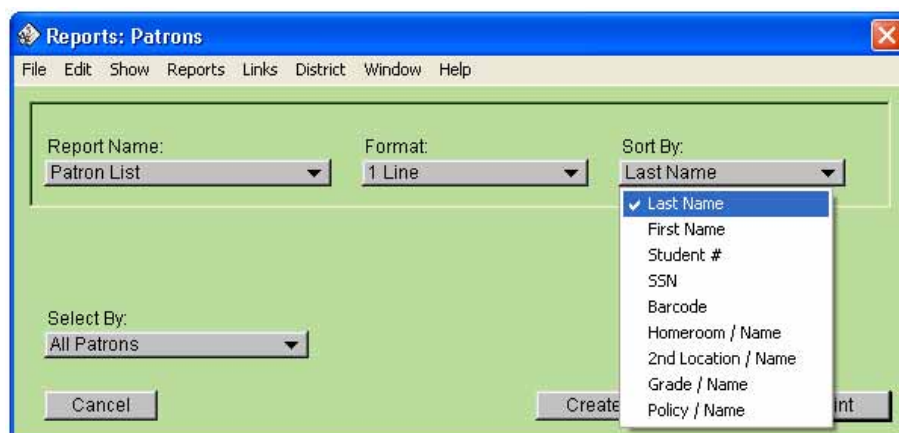
Use the following general steps to prepare a report.

- Step 1. Select a specific report type from the **Reports** menu.
- Step 2. Once the window has opened, select a specific report type from the **Report Name** drop-down menu.

- Step 3. If the report you have selected has more than one format, a **Format** drop-down menu will appear (e.g. some reports have a **1-Line** and **Detailed** format). Make a selection from the **Format** drop-down menu.



- Step 4. Select a sort order from the **Sort By** field<sup>1</sup>. The **Sort By** order determines how records are included in the report (e.g. **Patron Reports** can be sorted by name, barcode, policy, and other values). Some sort selections sort by two values (e.g. **Patron Lists** can be sorted by **Grade/Name**, resulting in patrons being sorted by grade and then by name).



- Step 5. Use the **Select By** drop-down menus to select which records are to be included in the reports. You can make up to seven selections using **AND**, **OR**, and **AND NOT** (Boolean logic) for your report. You are limited to seven selection ranges and may need a large monitor to accommodate them as the window grows with every choice. In addition, the order the selections are processed is from the top down and will affect the results if you are using both **AND** and **OR** operators at the same time.

When you choose values in the selection drop-down menus, other fields may appear and prompt you for required information (e.g. if you select **Activity** in the **Select By** drop-down menu, Date Range fields will appear, allowing you to enter a starting and ending date value).

<sup>1</sup> Since Alexandria allows you to customize certain terms for **Patrons** and **Items**, the term names you use may not be reflected in this manual. For purposes of illustration, the sample library we've used in this manual is a School Library and thus Community ID = Patron Number, Location = Homeroom, Level = Grade and so forth.

If you enter only a **Starting with** selection, Alexandria will select all records where the Grade begins with the entered text. For example, entering "GR1" would select "GR100", "GR10" and "GR1B37".

To do an exact match for a text field range, enter an **Ending With** value that matches the **Starting With** value followed by space and exclamation point. For example, **Starting With** "GR1" and **Ending With** "GR1 !" (unless you really have data named "GR1 !").

Step 6. Click the **Print** button. As Alexandria builds your report, the status of the report appears at the top of the **Report Results** window.

Step 7. As the report is processing, you can perform other tasks, check items in and out or even prepare other reports within Alexandria. If necessary, click the **Cancel** button to stop the report from processing.

If the **Report** window becomes hidden behind other windows, find it again under the Alexandria **Windows** menu.

When the report is complete, it appears in Alexandria's standard **Virtual Word Processing** window. Since the report is a word processing document, you can:

- View and edit the report on the screen using Alexandria's **Virtual Word Processing** commands.
- Choose **Save** from the **File** menu to save the report.
- Highlight text in the window and copy it to other programs or onto your desktop.
- Select **Print** from the **File** menu to send this report to the printer. Due to operating system limitations, you may only print one report at a time.



**NOTE:**

The settings for every report window are initially set to "locked" so you can't accidentally modify the

## Reports

Special Reports

Patron Reports

Item Reports

Circulation Reports

Usage Statistics

Order Reports

Subscription Reports

Quick Reports

## Quick Reports


## Creating Quick Reports

Alexandria includes the **Quick Report** ability, making it very easy to save the most frequently-used reports. Please note that Quick Reports only save the specifications that were used to create the report and do not save the results of a generated report. However, since all reports are standard word processing documents, you can save the actual report like any other virtual word processor document.

Use the following steps to create a **Quick Report**.

- Step 1. Select a report from the **Reports** menu.
- Step 2. Select all the options you want for this saved report template.

- Step 3. Click on the **Create Quick Report** button. When the following window appears, name the **Quick Report** format you just created.

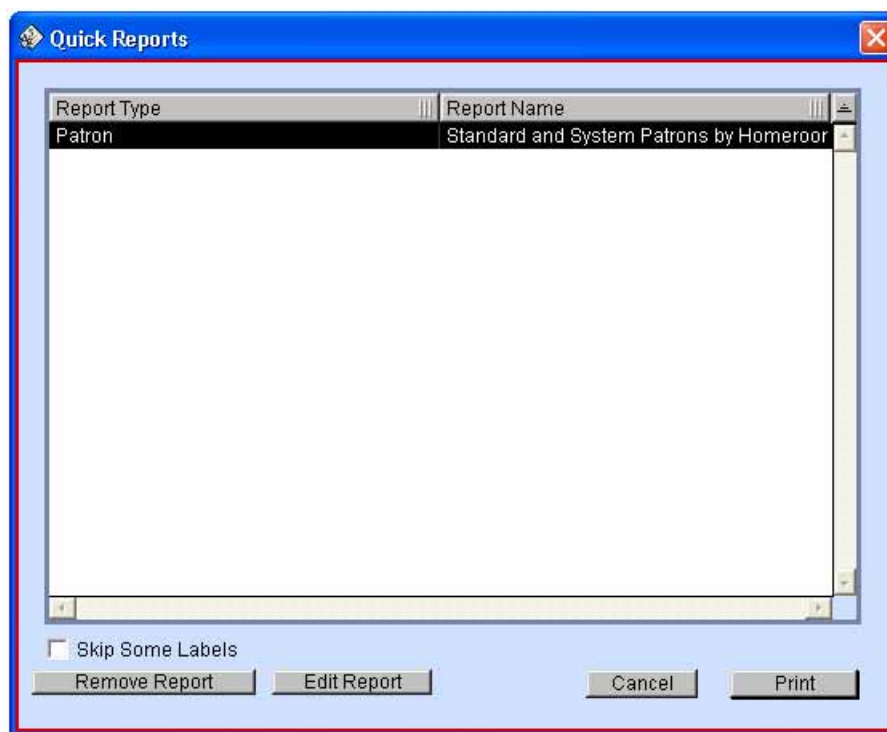
  
**NOTE:**  
 You can not change the name of a Quick Report although you can remove the one with the "bad" name and create another.

- Step 4. Click on **OK** to save the **Quick Report** you just created, otherwise click **Cancel**.
- Step 5. To view your saved report formats/templates, select **Quick Reports** from the **Reports** menu.



## Using Quick Reports

Use the following steps to use the **Quick Reports** you've saved.

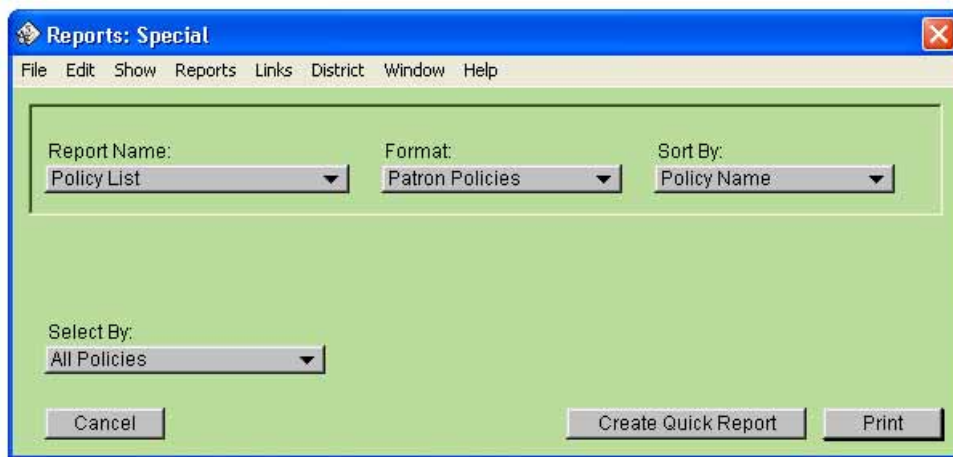
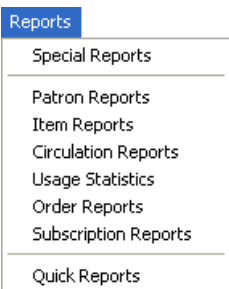


- Step 1. Select **Quick Reports** from the **Reports** menu.
- Step 2. Double-click on one of the report names or select a report and click **Print** or select **Print** from the **File** menu to prepare the saved report. To remove a **Quick Report**, select it and click the **Remove Report** button.
- Step 3. To edit a **Quick Report**, select it and click the **Edit Report** button. Make the necessary changes and click **Save**.
- Step 4. For label reports, you can check **Skip Some Labels** if you don't want the labels to print starting on the upper-left corner or if you don't want them to print consecutively. A window will appear, displaying the label sheet layout; click on the labels that you want to skip.



# Special Reports

These reports are special because they don't seem to fit into any other categories. They are used for displaying and printing information about your policies, calendars, barcode labels, and registration cards.



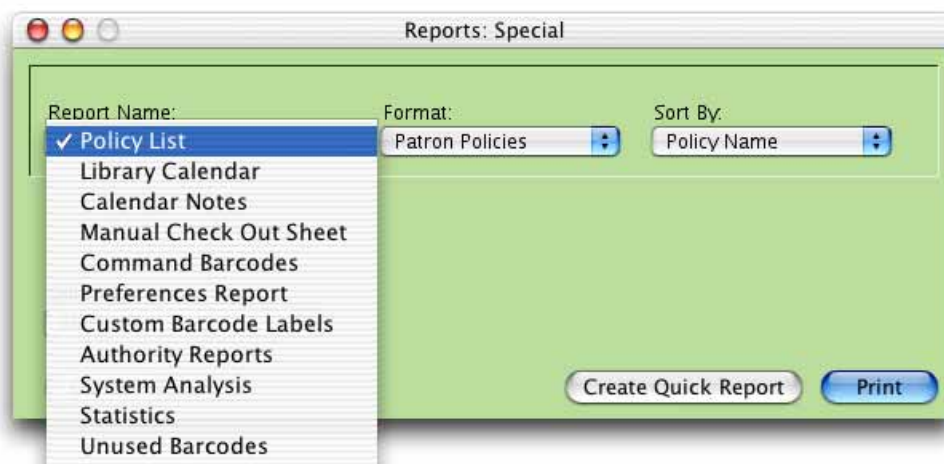
## Preparing Special Reports

- Step 1. Choose **Special Reports** from the **Reports** drop-down menu.
- Step 2. Choose the type of report you want from the **Report Name** drop-down menu.
- Step 3. Choose how you want your report **Format** displayed.
- Step 4. Select the **Sort By** option for your report.
- Step 5. Use the **Select By** drop-down menu to set options for the report.
- Step 6. Click the **Print** button to prepare the report.
- Step 7. Make any changes to the formatting.
- Step 8. Choose **Print** from the **File** menu.

- ✓ Policy List
- Library Calendar
- Calendar Notes
- Manual Check Out Sheet
- Command Barcodes
- Preferences Report
- Custom Barcode Labels
- Authority Reports
- System Analysis
- Statistics
- Unused Barcodes

## Policy List

Use this report to document all the policies you've defined.



### Policy List Report Formats

**Patron Policies**—Generates a report that includes all patron policies sorted by full policy name.

**Item Policies**—Prepares a report that includes all item policies sorted by full policy name.

**Circulation Policies**—Generates a report that includes all circulation policies sorted by full policy name.

### Policy List Sort By Options

**Policy Name**—This option arranges all patron policies by policy name.

### Policy List Select By Options

**All Policies**—This prepares a list of all policies for the format selected.

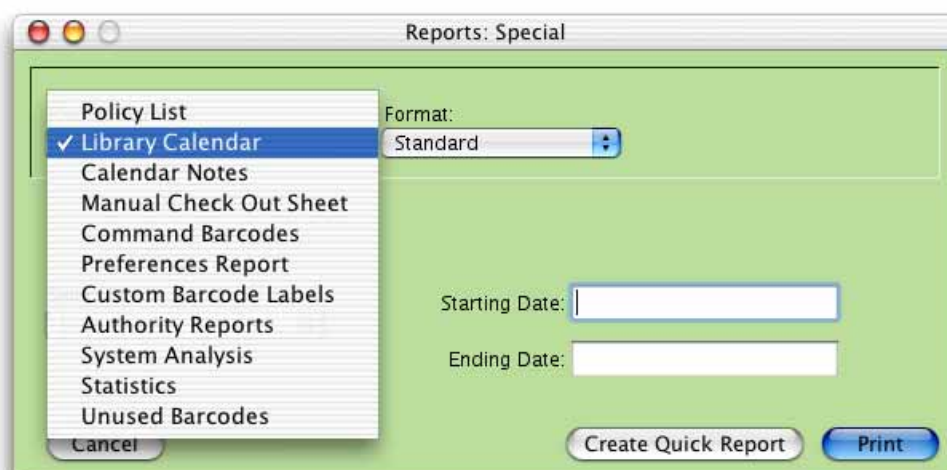


- ✓ Policy List
- Library Calendar
- Calendar Notes
- Manual Check Out Sheet
- Command Barcodes
- Preferences Report
- Custom Barcode Labels
- Authority Reports
- System Analysis
- Statistics
- Unused Barcodes

## Library Calendar

This report prints calendars in a month-per-page format over a specified date range. Only the month of the **Starting** or **Ending Date** is used, although the program requires you enter a full date.

You can use this report to print a post for any calendars in your system.



## Library Calendar Report Formats

**Standard**—This **Format** generates reports for the **Standard** calendar. When you create your own calendars, more selections will appear under this **Format** drop-down menu (see “Calendar Preferences” on page 103).

## Library Calendar Select By Options

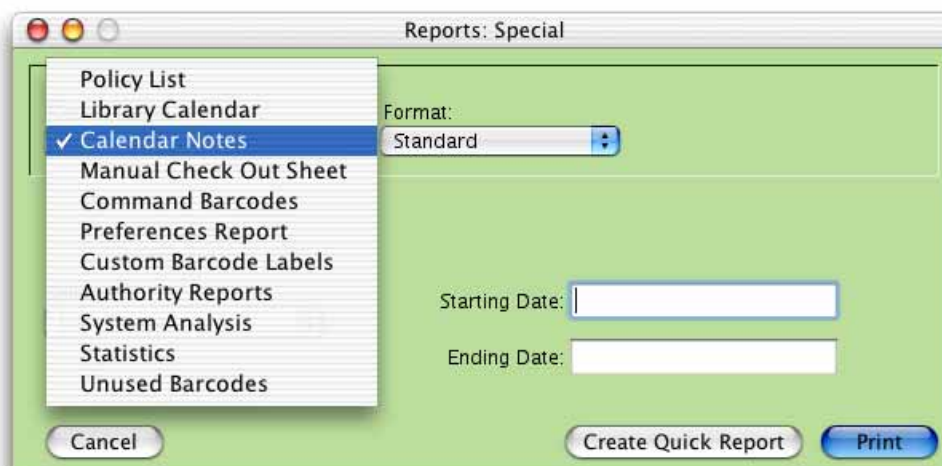
**Date Range**—Enter a **Starting** and **Ending Date** range. If you enter ONLY a **Starting Date**, the ending date is assumed to be in the “far future.” If you enter ONLY an **Ending Date**, the **Starting Date** is assumed to be in the “far past.” If you don’t enter any date, the **Starting Date** is set for one year in the sat. For example, you can enter the date December 1, 2004 as: “Dec 1, 2004” or “12/01/04”<sup>1</sup> or “12.1.04” or “12 1 04”. If the year is 2004, you can just enter “12/1.” If the current month is December, you can just enter “1.”

1. When you enter a two digit date, values between 0-30 are assumed to be 2000-2030 and values between 31-99 are assumed to be 1931-1999.

- ✓ Policy List
- Library Calendar
- Calendar Notes
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- Custom Barcode Labels
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- Unused Barcodes

## Calendar Notes

This report prints the selected library calendar notes throughout a specified date range



### Calendar Notes Report Formats

**Standard**—This **Format** generates reports for the **Standard** calendar. When you create your own calendars, more selections will appear under this **Format** drop-down menu (see “Calendar Preferences” on page 103).

### Calendar Notes Select By Options

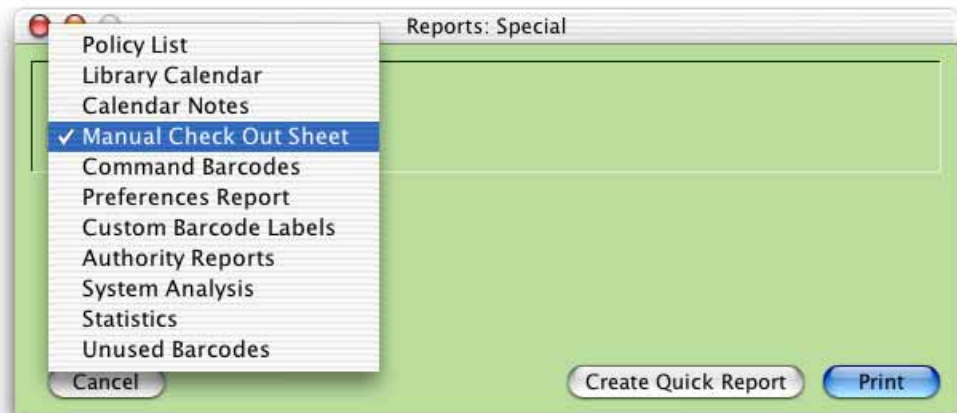
**Date Range**—Enter a **Starting** and **Ending Date** range. If you enter **ONLY** a **Starting Date**, the ending date is assumed to be in the “far future.” If you enter **ONLY** an **Ending Date**, the **Starting Date** is assumed to be in the “far past.” If you don’t enter any date, the **Starting Date** is set for one year in the past. For example, you can enter the date December 1, 2004 as: “Dec 1, 2004” or “12/01/04”<sup>1</sup> or “12.1.04” or “12 1 04”. If the year is 2004, you can just enter “12/1.” If the current month is December, you can just enter “1.”

1. When you enter a two digit date, values between 0-30 are assumed to be 2000-2030 and values between 31-99 are assumed to be 1931-1999.

- ✓ Policy List
- Library Calendar
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## Manual Checkout Sheet

Prints manual checkout sheets. It's a simple form that can be used to record transactions that can later be entered into Alexandria. You can also use one of COMPanion's portable laser scanners to perform transactions when the computer system isn't available.



There are no **Format**, **Sort By**, or **Select By** drop-down menu options for this report selection.

- ✓ Policy List
- Library Calendar
- Calendar Notes
- Manual Check Out Sheet
- Command Barcodes
- Preferences Report
- Custom Barcode Labels
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- Statistics
- Unused Barcodes

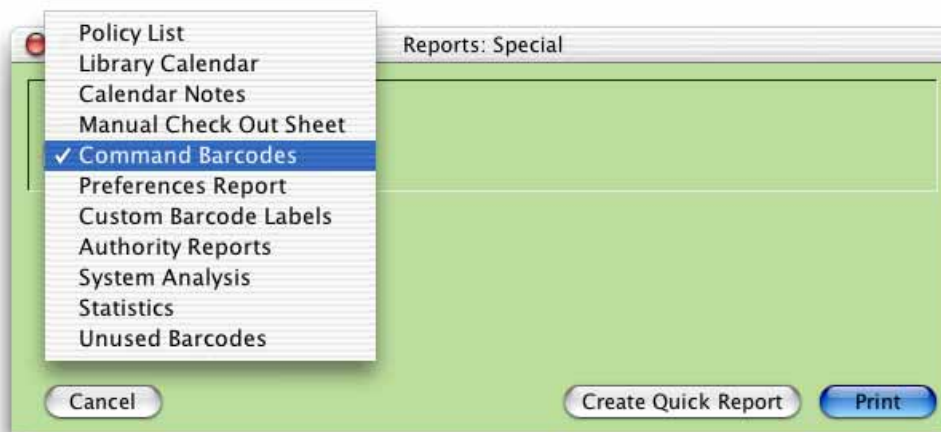
**NOTE:**

These command labels can be used with the portable reader to enter circulation commands into the reader.

## Command Barcodes

Prepares a sheet of barcodes used to scan commands into the **Circulation** window.

To perform a specified command in the **Circulation** window, just scan the command with your scanner. Print this sheet and attach it to your desk for quick-entry of **circulation commands**.

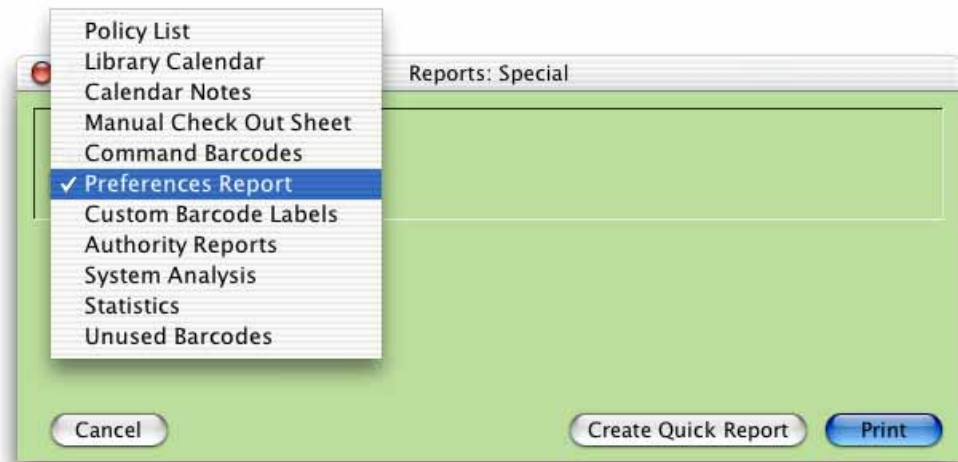


There are no **Format**, **Sort By**, or **Select By** drop-down menu options for this report selection.

- ✓ Policy List
- Library Calendar
- Calendar Notes
- Manual Check Out Sheet
- Command Barcodes
- Preferences Report
- Custom Barcode Labels
- Authority Reports
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- Statistics
- Unused Barcodes

## Preferences Report

A report of all library preferences *not* available through other reports.

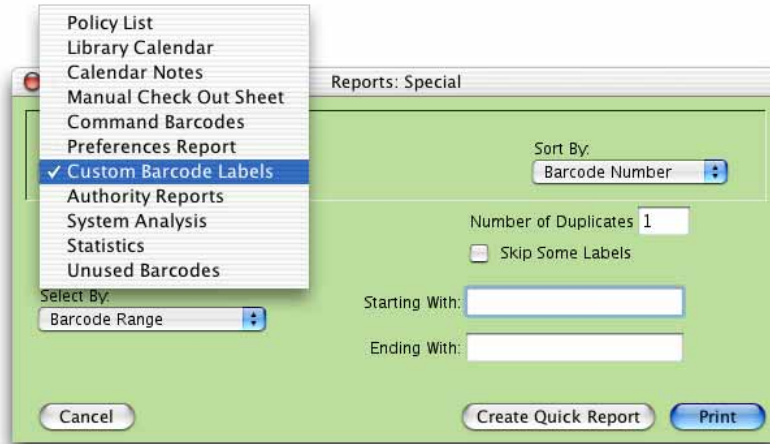


There are no **Format**, **Sort By**, or **Select By** drop-down menu options for this report selection.

- ✓ Policy List
- Library Calendar
- Calendar Notes
- Manual Check Out Sheet
- Command Barcodes
- Preferences Report
- Custom Barcode Labels
- Authority Reports
- System Analysis
- Statistics
- Unused Barcodes

## Custom Barcode Labels

This report prints barcode labels, sorted by number, over a specified range. This report will only work with sheet feed printers. It will print Code 3 of 9 labels (30 per page) on special laser-printer paper available from COMPanion. Enter a **Starting With** and **Ending With** number.



When you click **Print**, you'll see the following window:



This window allows you to enter the text that will be printed on the top and bottom of labels.

You can check **Skip Some Labels** if you don't want the labels to print starting on the upper left corner or if you don't want them to print consecutively. A window will appear, displaying the label sheet layout; click on the labels that you want to skip.

You can use these labels for any purpose. Typically, you'll use them for printing temporary barcode labels and creating new item and patron labels; however, the advantage of printing labels from other barcode printing reports is that patron labels will have the patron's name on them and item labels will have the title and call number printed on them.

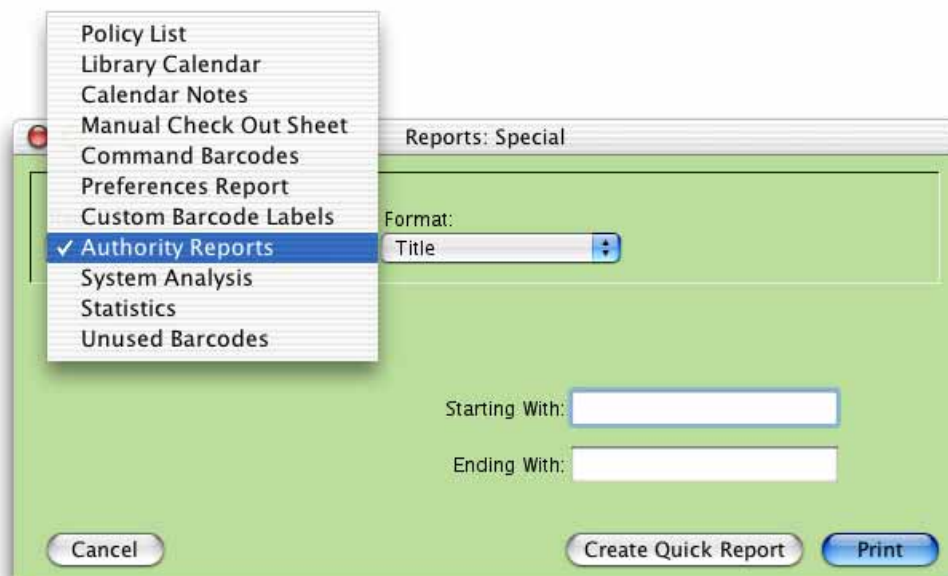
### - N O T E -

If you are planning on using label protectors, test your scanners before placing label protectors over your labels. Some combinations of protectors/scanners don't work well together and you don't want to be forced to replace your scanners or labels if there is a conflict.

- ✓ Policy List
- Library Calendar
- Calendar Notes
- Manual Check Out Sheet
- Command Barcodes
- Preferences Report
- Custom Barcode Labels
- Authority Reports
- System Analysis
- Statistics
- Unused Barcodes

## Authority Reports

This report provides information on the terms created in your catalog. This report includes the full tag entry with all subfields and indicators.



- ✓ Title
- Author
- Full Subject
- Series
- Curriculum Code
- Interest Code
- Bibliographic Code
- Medium
- Location
- Shelving
- Library
- Publisher
- Funding Source
- Patron School
- Patron Homeroom
- Patron 2nd Location
- Patron Grade
- City
- State

## Authority Report Formats

**Title**—Only title entries are included.

**Author**—Only author entries are included.

**Full Subject**—Only full subject entries are included. Please note that subject entries are for subject tags only, not for subject subfields.

**Series**—Only series entries are included.

**Curriculum Code**—Only Alexandria curriculum codes are included.

**Interest Code**—Only interest codes entries are included.

**Bibliographic Code**—Only Alexandria bibliographic codes are included.

**Medium**—Only medium types are included

**Location**—Only location entries are included

**Shelving**—Only shelving location entries are included

**Library**—Only library location entries are included

**Publisher**—Only publisher name entries are included.

**Funding Source**—Only funding source entries are included

**Patron School**—Only patron school entries are included

**Patron Homeroom**—Only patron homeroom entries are included

**Patron 2nd Location**—Only patron 2nd location entries are included

**Patron Grade**—Only patron grade entries are included

**City**—Only city location entries are included

**State**—Only state location entries are included

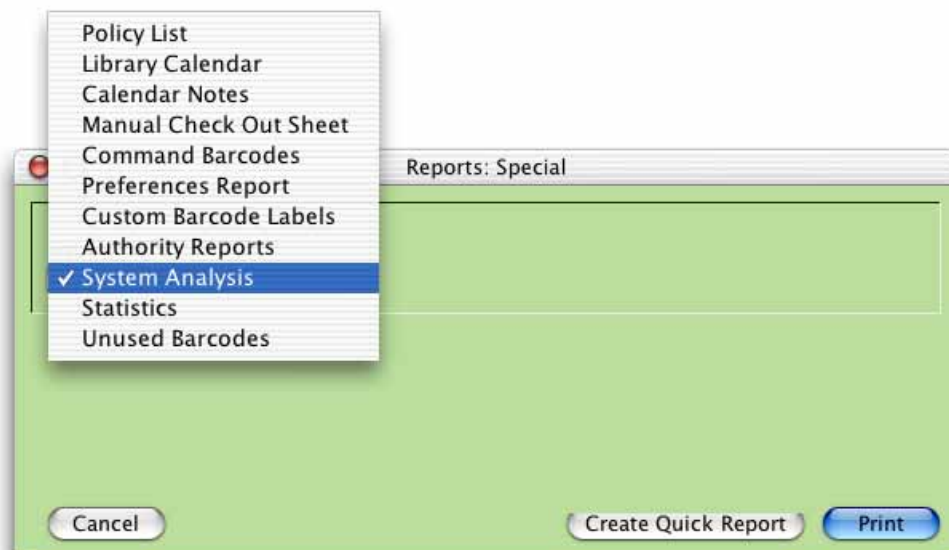
There are no **Sort By**, or **Select By** drop-down menu options for this report selection.



- ✓ Policy List
- Library Calendar
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- Preferences Report
- Custom Barcode Labels
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## System Analysis

This report shows information about your computer system and Alexandria **Data** files.



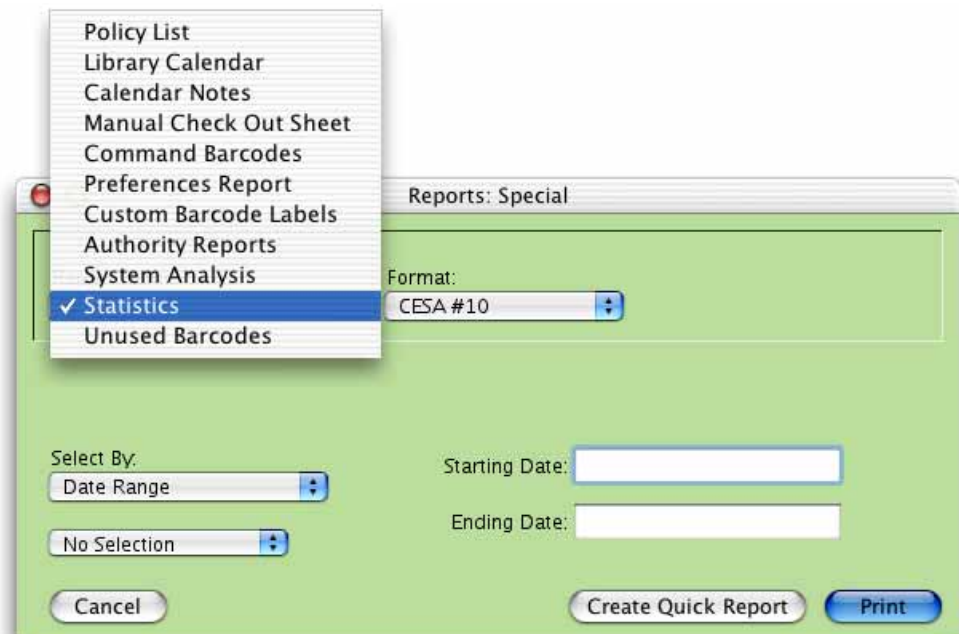
There are no **Format**, **Sort By**, or **Select By** drop-down menu options for this report selection.



- ✓ Policy List
- Library Calendar
- Calendar Notes
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## Statistics

This report shows the number of items that were used (checked in/out) by patrons in each homeroom per quarter. It goes on to show the total amount and value as a district. On a district level, it is helpful to see which items that patron groups are using and when they are being used during the year.



In order for statistics reports to work, you need to check the **Keep History for all Patrons** under the **Patron Management** preference window (see “*Patron Management Preference*” on page 137) or check the **Keep Patron History** box for each individual patron whose history you want to track under the **Statistics** tab on the **Patron Management** window (see “*Statistics*” on page 186).

## Statistics Formats

**Cesa #10**—Allows you to print a report based on **Cesa #10** statistics.

**Advanced Bookings**—Allows you to print a report based on **Advanced Bookings** statistics.

## Statistics Select By Options

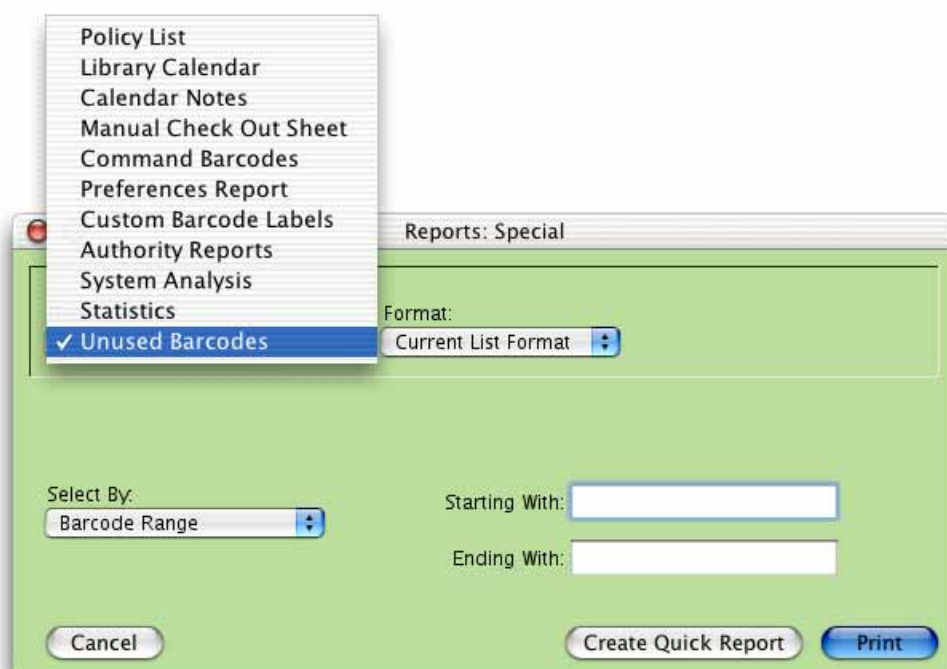
**Date Range**—Enter a **Starting** and **Ending Date** range. If you enter ONLY a **Starting Date**, the ending date is assumed to be in the “far future.” If you enter ONLY an **Ending Date**, the **Starting Date** is assumed to be in the “far past.” If you don’t enter any date, the **Starting Date** is set for one year in the sat. For example, you can enter the date December 1, 2004 as: “Dec 1, 2004” or “12/01/04”<sup>1</sup> or “12.1.04” or “12 1 04”. If the year is 2004, you can just enter “12/1.” If the current month is December, you can just enter “1.”

1. When you enter a two digit date, values between 0-30 are assumed to be 2000-2030 and values between 31-99 are assumed to be 1931-1999.

- ✓ Policy List
- Library Calendar
- Calendar Notes
- Manual Check Out Sheet
- Command Barcodes
- Preferences Report
- Custom Barcode Labels
- Authority Reports
- System Analysis
- Statistics
- Unused Barcodes

## Unused Barcodes

This report will prepare a list of all unused patron/item barcodes within your Alexandria database.



## Unused Barcode Formats

**Current List Format**—This format supplies a list of barcode numbers that are currently not in use by Alexandria (within the specified barcode range).

**Custom Barcode Format**—This format allows users to print barcodes (within a specified range) that are not already in use by Alexandria.

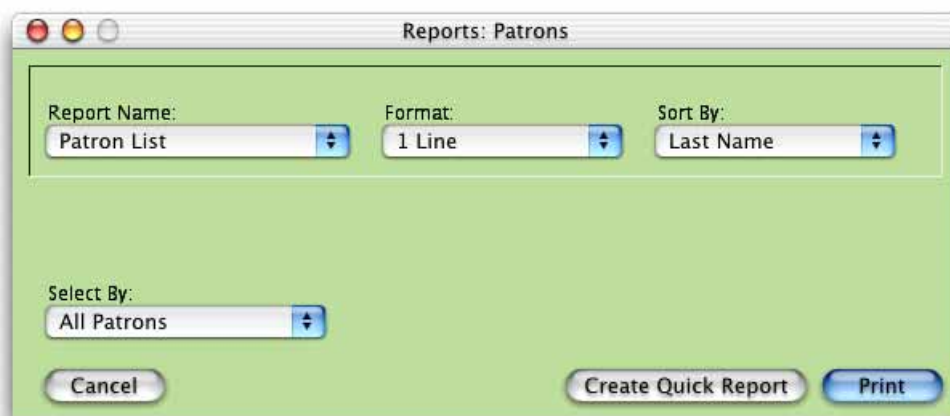
## Unused Barcodes Select By Options

**Barcode Range**—This report includes patrons/items with barcodes between the selected **Starting With** and **Ending With** ranges. If you only want information on one patron or item, enter the patron/item's barcode number as the **Starting With** value. Also, if you don't specify otherwise, only barcodes greater than the number 50 are included in the report.

# Patron Reports

## Preparing Patron Reports

Patron reports give you immediate access to information about the patrons who use your library. Patron reports can create lists, notices, cards and labels. To prepare a **Patron Report**, follow these steps:



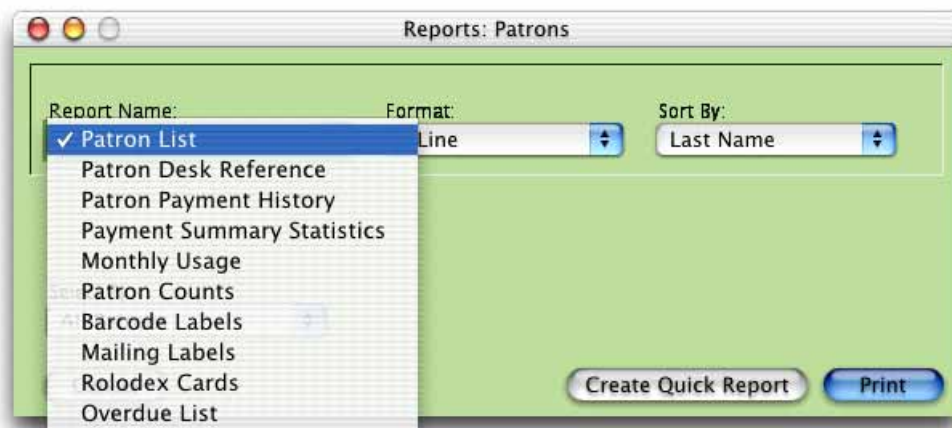
- Step 1. Choose **Patron Reports** from the **Reports** drop-down menu.
- Step 2. Choose the type of report you want from the **Report Name** drop-down menu.
- Step 3. Choose whether you want to have your report **Detailed**, or **1-Line**, or any other format that's available from the drop-down menu.
- Step 4. Choose how you want this report sorted using the **Sort By** drop-down menu.
- Step 5. Use the **Select By** drop-down menu to select what patron record information to include in this report.
- Step 6. Click on the **Print** button to prepare the report.
- Step 7. Make any desired changes using the **Virtual Word Processor** tools.
- Step 8. To send to the printer, either click on the **Printer** icon or choose **Print** under the **File** menu.

The following selections describe Alexandria's **Patron Report Names**, **Formats**, **Sort By**, and **Select By** options.

- ✓ Patron List
- Patron Desk Reference
- Patron Payment History
- Payment Summary Statistics
- Monthly Usage
- Patron Counts
- Barcode Labels
- Mailing Labels
- Rolodex Cards
- Overdue List

## Patron List

This report prepares a wide range of information about the patrons using your library.



### Patron List Report Formats

There are two available formats for the patron list.

**1 Line**—This format provides minimal information for each patron you select, including only the patron's name, level, barcode, community ID and location.

**Detailed**—This format includes all available information for the patrons that you select. This includes name, address, phone number, status, card expiration date, date of last use, policy, patron ID, birth, sex, location, level, 2nd Location, graduation year, contact and contact's phone number. You can also use the checkbox that appears to include patron pictures.

**Patron Cards**—This format prints patron library cards. If you would like to include your patron's picture as an extra measure of identification, check the **Include Patron Pictures** box when selecting this format.

### Patron List Sort By Options

See "Patron Report Sort By Options" on page 394 for complete and detailed descriptions of Patron List **Sort By** options.

### Patron List Select By Options

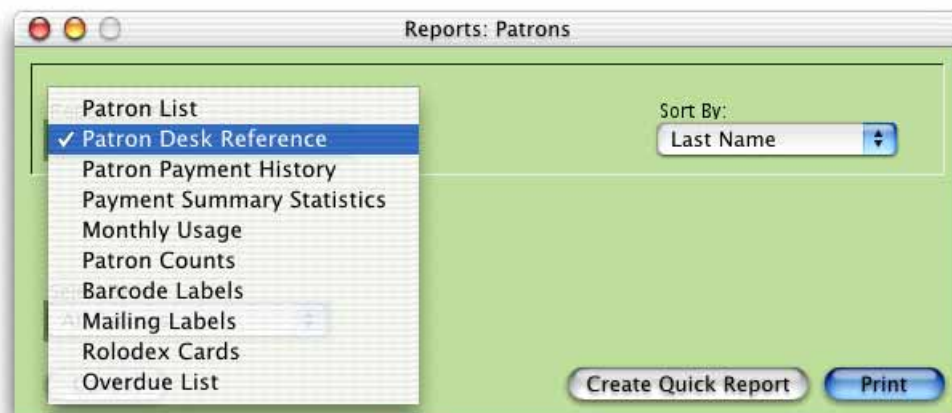
See "Patron Report Select By Options" on page 395 for complete and detailed descriptions of Patron List **Select By** options.



## Patron Desk Reference

This report acts as a desk reference for the librarian. It contains a printed barcode and patron information about each selected patron. This includes name, address, location, and phone number. This report is useful if patrons do not have (or have lost) a library card with a printed barcode. The printed barcode on the desk reference can be scanned to make the patron current.

You can use the **Sort By** options on this report to make it more useful. For instance, if patrons visit your library by location (e.g. Homeroom), you can sort the desk reference by location. As children visit the library, you can quickly locate them on the desk reference under their location and scan their barcode label.



There are no **Formats** available for this report.

## Patron Desk Reference Sort By Options

See "Patron Report Sort By Options" on page 394 for complete and detailed descriptions of Patron Desk Reference **Sort By** options.

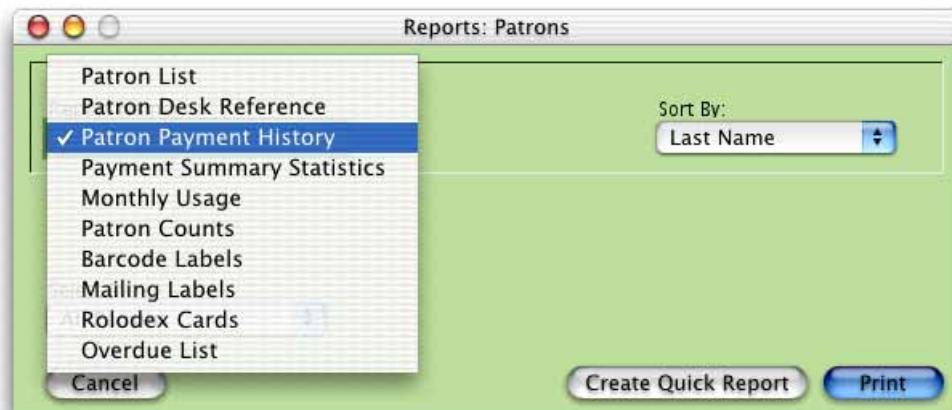
## Patron Desk Reference Select By Options

See "Patron Report Select By Options" on page 395 for complete and detailed descriptions of Patron Desk Reference **Select By** options.

- ✓ Patron List
- Patron Desk Reference
- Patron Payment History
- Payment Summary Statistics
- Monthly Usage
- Patron Counts
- Barcode Labels
- Mailing Labels
- Rolodex Cards
- Overdue List

## Patron Payment History

This report is a detailed list of all payments made to the library by patrons. It includes the patron's name, barcode number, and information regarding each payment date, type of payment, amount of payment, and the barcode number of the item against which the payment was made.



There are no **Formats** options available for this report.

### Patron Payment History Sort By Options

See "Patron Report Sort By Options" on page 394 for complete and detailed descriptions of Patron Payment History **Sort By** options.

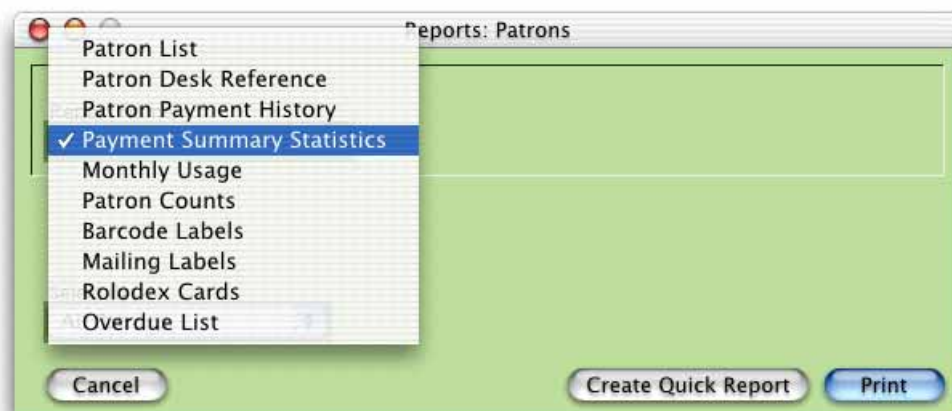
### Patron Payment History Select By Options

**All Patrons**—This report includes all the patrons for whom you have records including those who have barcode numbers under 50 and a **Status** of **Active**.





## Patron Summary Statistics



There are no **Formats** or **Sort By** options available for this report.

### Patron Summary Statistics Select By Options

**All Patrons**—This report includes all the patrons for whom you have records including those who have barcode numbers under 50 and a **Status** of **Active**.

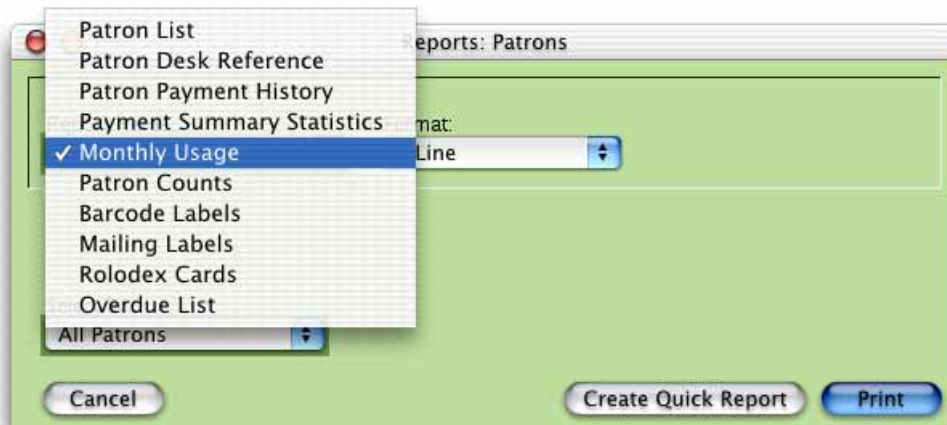
**Date Range**—Enter a **Starting** and **Ending Date** range. If you enter ONLY a **Starting Date**, the ending date is assumed to be in the “far future.” If you enter ONLY an **Ending Date**, the **Starting Date** is assumed to be in the “far past.” If you don’t enter any date, the **Starting Date** is set for one year in the sat. For example, you can enter the date December 1, 2004 as: “Dec 1 , 2004” or “12/01/04”<sup>1</sup> or “12.1.04” or “12 1 04”. If the year is 2004, you can just enter “12/1.” If the current month is December, you can just enter “1.”

1. When you enter a two digit date, values between 0-30 are assumed to be 2000-2030 and values between 31-99 are assumed to be 1931-1999.

- ✓ Patron List
- Patron Desk Reference
- Patron Payment History
- Payment Summary Statistics
- Monthly Usage
- Patron Counts
- Barcode Labels
- Mailing Labels
- Rolodex Cards
- Overdue List

## Monthly Usage

This report shows the patrons' life-to-date library usage by month. Use this report to see the usage pattern for all patrons or a group of patrons. For example, to compare the library usage of eighth graders against that of the ninth graders, choose **Policies** as the **Select By** option and run a report for each policy.



There are no **Sort By** options available for this report when using the **1-Line** format. Refer to page 394 for **Sort By** options when using the **Detailed** report format.

## Monthly Usage Report Formats

There are two formats for the Monthly Usage report.

**1 Line**—This provides a 1-line summary of selected patrons' life-to-date library usage by month and totals all the usage for the selected patrons.

**Detailed**—This provides a detailed summary of the selected patrons' library usage by month and their total life-to-date usage. The report includes each patron's name, barcode number, patron ID, and monthly usage total for the past year, and a life-to-date usage total.

## Monthly Usage Select By Options

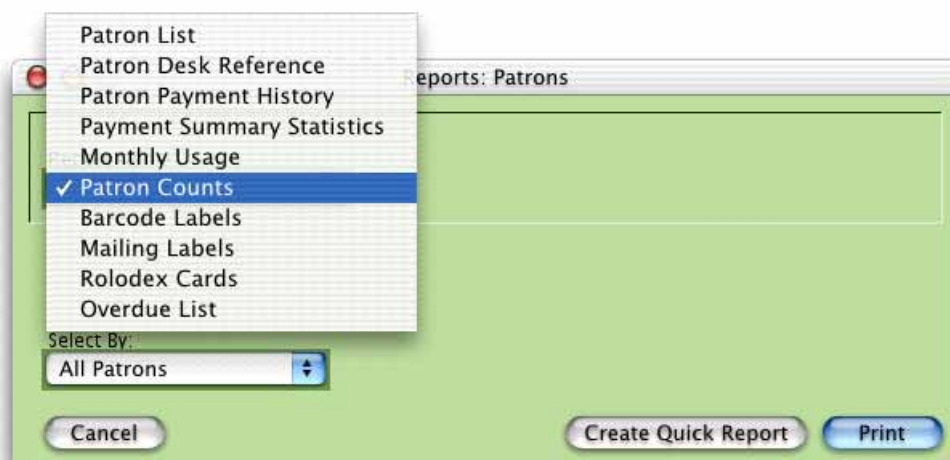
See "Patron Report Select By Options" on page 395 for complete and detailed descriptions of Monthly Usage **Select By** options.





## Patron Counts

This report can provide you with an exact number of patrons who are suspended, how many patrons have expired cards, or how many patrons fall under a particular policy depending on the Select By criteria used in creating the report.



There are no **Formats** or **Sort By** options available for this report.

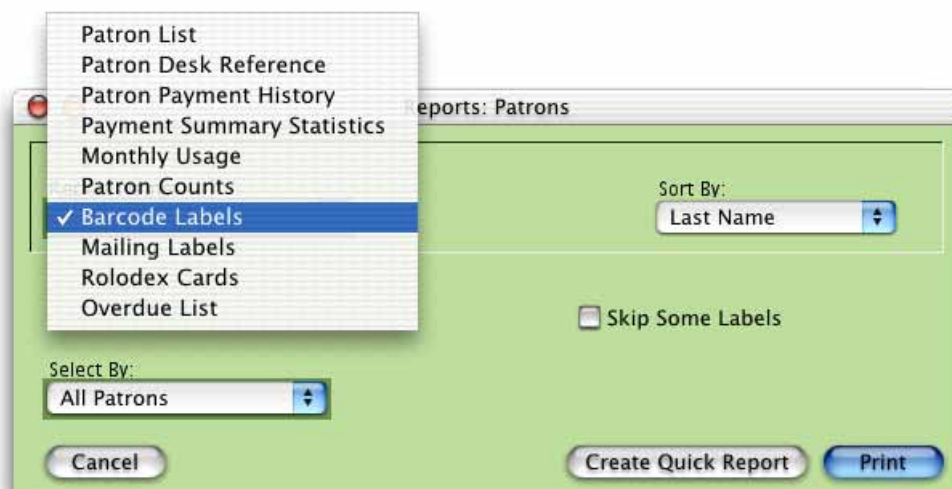
## Patron Counts Select By Options

See "Patron Report Select By Options" on page 395 for complete and detailed descriptions of Patron Counts **Select By** options.



## Barcode Labels

This report prints a barcode label for each selected patron. The label includes the patron's name, the barcode number, and barcode. Use the **Skip Some Labels** checkbox to indicate areas on the label sheet not to be printed.



There are no **Formats** available for this report.

### Barcode Labels Sort By Options

See "Patron Report Sort By Options" on page 394 for complete and detailed descriptions of Barcode Labels **Sort By** options.

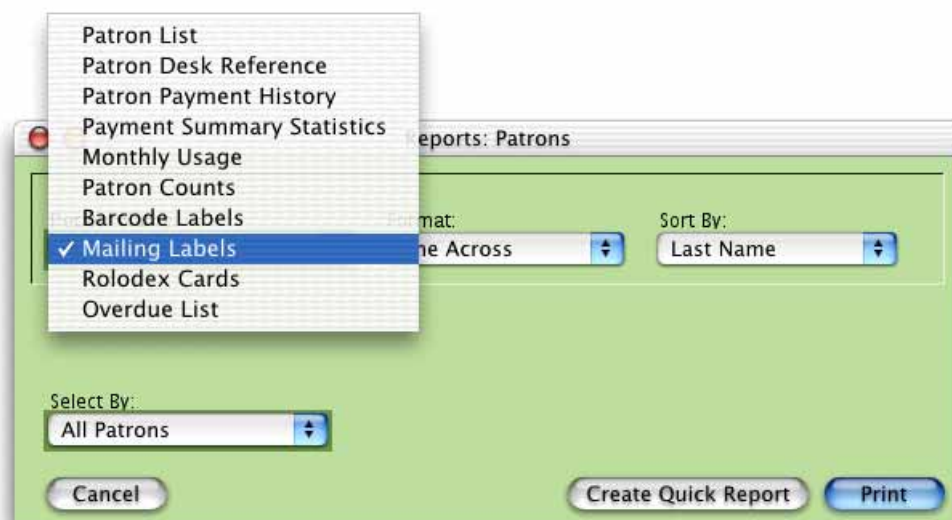
### Barcode Labels Select By Options

See "Patron Report Select By Options" on page 395 for complete and detailed descriptions of Barcode Labels **Select By** options.



## Mailing Labels

This report prints a mailing label for each selected patron. This **Mailing Labels** form is designed for page printers with three labels across and ten down.



## Mailing Labels Report Formats

**One Across**—This format prints patron mailing labels on a page with labels printed in one column at a time and down.

**Three Across**—This format prints patron mailing labels on a page with three labels across and ten down. Use the **Skip Some Labels** checkbox to indicate areas on the label sheet not to be printed.

## Mailing Labels Sort By Options

See "Patron Report Sort By Options" on page 394 for complete and detailed descriptions of Mailing Labels **Sort By** options.

## Mailing Labels Select By Options

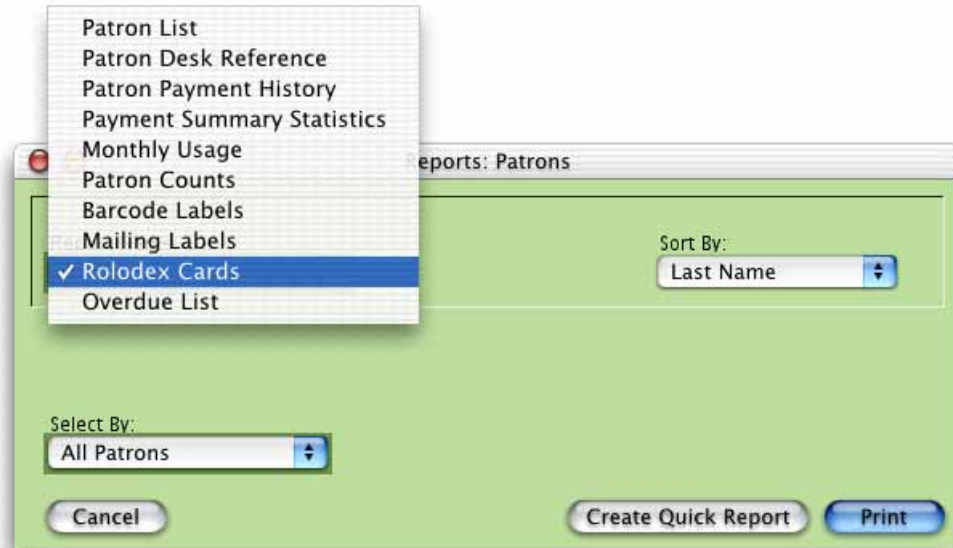
See "Patron Report Select By Options" on page 395 for complete and detailed descriptions of Mailing Labels **Select By** options.

- ✓ Patron List
- Patron Desk Reference
- Patron Payment History
- Payment Summary Statistics
- Monthly Usage
- Patron Counts
- Barcode Labels
- Mailing Labels
- Rolodex Cards
- Overdue List

## Rolodex Cards

This report prints a rolodex card for each selected patron. The rolodex cards show the patron's name, barcode, barcode number, level, location, phone number, and address.

Contact COMPanion for paper pricing and stock.



There are no **Formats** available for this report.

### Rolodex Cards Sort By Options

See "Patron Report Sort By Options" on page 394 for complete and detailed descriptions of Rolodex Cards Sort By options.

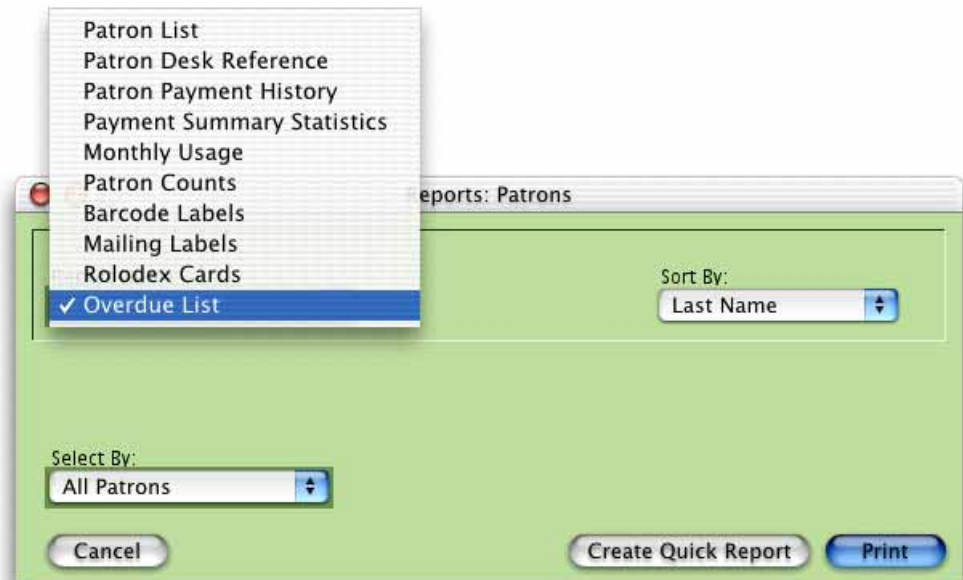
### Rolodex Cards Select By Options

See "Patron Report Select By Options" on page 395 for complete and detailed descriptions of Rolodex Select By options.



## Overdue List

This report prints an overdue book list. This list includes the patron name, location, item call number, item barcode, item title, date due, and fine amount.



There are no **Formats** available for this report.

### Overdue List Sort By Options

See "Patron Report Sort By Options" on page 394 for complete and detailed descriptions of Overdue List **Sort By** options.

### Overdue List Select By Options

See "Patron Report Select By Options" on page 395 for complete and detailed descriptions of Overdue List **Select By** options.

☒ Last Name

☐ First Name

☐ Student #

☐ SSN

☐ Barcode

☐ Homeroom / Name

☐ 2nd Location / Name

☐ Grade / Name

☐ Policy / Name

Patron Report Sort By Options

Use the **Sort By** drop-down menu to select the order in which you want the patrons included in your report. For example, you can sort the report by name or by barcode number.

**Last Name**—The report is sorted by the patron’s full name in “Last Name, First Name” format.

**First Name**—The report is sorted by the patron’s full name in “First Name, Last Name” format.

**Student #**—The report is sorted by the patron’s community ID field.

**SSN**—The report is sorted by the patron’s government ID.

**Barcode**—The report is sorted by the patron’s barcode number.

**School/Name**—The report is sorted by the patron’s school and then by the patron’s name.

**Homeroom/Name**<sup>1</sup>—The report is sorted by the patron’s location (typically **Homeroom** for schools), and within each location, by the patron’s name. Each location will begin on a new page.

**2nd Location/Name**<sup>2</sup>—The report is sorted by the patron’s 2nd Location, and within each 2nd Location by the patron’s name. Each 2nd Location will begin on a new page.

**Grade/Name**<sup>3</sup>—The report is sorted by the patron’s level, (typically **Grade** in school-based systems), and within each level, by the patron’s name. Each level begins on a new page.

**Policy/Name**—The report is sorted by the patron’s policy name, and within each policy name by the patron’s name. Each new policy name will begin on a new page.

1. Alexandria will use your customized name for Location. In this example it’s Homeroom.  
2. Alexandria will use your customized name for 2nd Location.  
3. Alexandria will use your customized name for Level. In this example it’s Grade.

✓ All Patrons
2nd Location
Activity
Barcode List
Barcode Range
Birthdate
Expired Card
Grade
Homeroom
Last Name
No Activity
Policy
Sequence #
Status

## Patron Report Select By Options

Use the **Select By** drop-down menu to select which patrons you want included in the report. You can enter as many values for selection criteria as you need using And, Or, and And Not (Boolean Logic). When you choose values using the selection drop-down menu, other fields appear, prompting you for **Starting With** and **Ending With** values. For example, you can select patrons included with a certain level or patrons with expired library cards.

**All Patrons**—This selection includes all the patrons for whom you have records including those who have barcode numbers under 50 and a **Status** of **Active**.

**2nd Location** This selection includes patrons with a 2nd Location between the **Starting With** and **Ending With** ranges. If you enter *only* a **Starting With** (or **Ending With**) selection, Alexandria will select all records where the 2nd Location data begins with the entered text. If you enter no text, the selection is ignored. The default name for **2nd Location** is **2nd Location**.

**Activity**—This selection includes patrons who have used the library within specified dates. If you enter **ONLY** a **Starting Date**, the ending date is assumed to be in the “far future.” If you enter **ONLY** an **Ending Date**, the **Starting Date** is assumed to be in the “far past.” If you don’t enter any date, the **Starting Date** is set for one year in the past.

**Barcode List**—This selection allows the librarian to enter or scan non-sequential barcodes to appear on the report. Duplicate entries will only print once. This list can be selected with the **Select All** command under the **Edit** menu and copied to use in selecting for other reports.

**Barcode Range**—This report includes patrons with barcodes between the selected **Starting With** and **Ending With** ranges. If you only want information on one patron, enter the patron’s barcode number as the **Starting With** value. Also, if you don’t specify otherwise, only barcodes greater than the number 50 are included in the report.

**Birthdate**—This selection includes all patrons with birthdays in the specified range. If you enter only an end date, it will include every birthday **ON** or **BEFORE** that date.

**Expired Card**—This report includes patrons whose cards will expire as of the specified date. If you do not enter a date, the beginning of the next month is used as the selected date. Thus, your report would include all patrons whose cards will expire at the end of the current month.

**Grade**—This selection includes patrons with **Levels** between the **Starting With** and **Ending With** ranges. If you enter only a **Starting With** selection, Alexandria will select all records where the data begins with the entered text. If you only enter an **Ending With** level, Alexandria will select all levels before and up to the selected level. If you enter no text, the selection is ignored. The default name for **Level** in a school library is typically **Grade**.

**Homeroom**—This selection includes patrons with **Locations** between the **Starting With** and **Ending With** ranges. If you enter only a **Starting With** (or **Ending With**) selection, Alexandria will select all records where the location begins with the entered text. For example, entering “HR1” would select “HR100”, “HR10” and “HR1B37”. If you enter no text, the selection is ignored. The default name for **Location** in a school library is typically **Homeroom**.



If your reports being sorted incorrectly, you may have not entered your numeric ranges correctly in the **Patron Management Location** field (*see page 183*). They must be padded with zeros in order to be sorted and selected correctly. For example, instead of a "1", "2", "402", you'd insert "001", "027", "402". Basically, all entries within a numeric range *need* to have the *same number* of characters.

**Last Name**—This selection includes patrons with **Last Names** (in last name, first name order) between the **Starting With** and **Ending With** ranges. Use this to compile reports for all patrons within a particular family, or to print lists selected from any alphabetical range of names. If you enter only a **Starting With** (or **Ending With**) selection, Alexandria will select all records where the data begins with the entered text. If you enter no text, the selection is ignored.

**No Activity**—This selection includes patrons who have not used the library within the specified date range. If you enter only a **Starting Date**, the ending date is assumed to be in the "far future." If you enter only an **Ending Date**, the **Starting Date** is assumed to be in the "far past." If you don't enter any date, the **Starting Date** is set one year in the past.

**Policy**—This selection includes patrons with **Policies** between the **Starting With** and **Ending With** ranges. For example, if you only want to select patrons under Alexandria's default patron policy (Standard Patron), select the report by policy and choose Standard Patron as the **Starting With** (and **Ending With**) value.

**School**—This selection includes patrons with **Schools** between the **Starting With** and **Ending With** range. If you enter only a **Starting With** (or **Ending With**) selection, Alexandria will select all records where the data exactly matches the entered text. If you enter no text, the selection will be ignored.

**Sequence #**—This selection includes patrons with **Sequence numbers** between the **Starting With** and **Ending With** range. This option is helpful in identifying new patrons or patrons added to the system in a particular order. If you enter only a **Starting With** (or **Ending With**) selection, Alexandria will select all records where the data exactly matches the entered text. If you enter no text, the selection will be ignored.

**Status**—This selection includes only patrons with the status you specify. Select **All** to choose **All Status** codes. If you don't specify a particular status, only **Active** patrons are included on the report.

**- N O T E -**

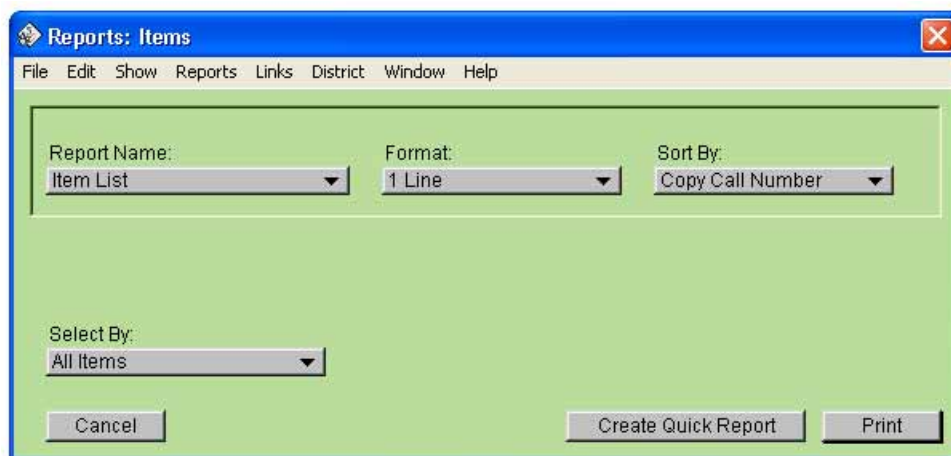
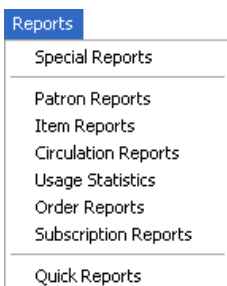
Unless you *specifically* select them, patrons with barcodes under the number fifty are NOT included in the reports. If you specifically want to include patron's with barcodes less than fifty, use the barcode selection option. In addition, only patrons with an **Active** status are included. If you want to specifically include patrons with all statuses, choose **All** from the **Status** drop-down menu or choose the exact status you'd like.



# Item Reports

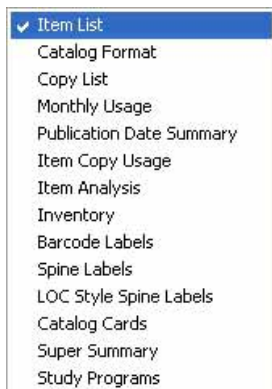
## Preparing Item Reports

Item Reports give you immediate access to information about the items in your collection. To prepare an Item Report, follow these steps.



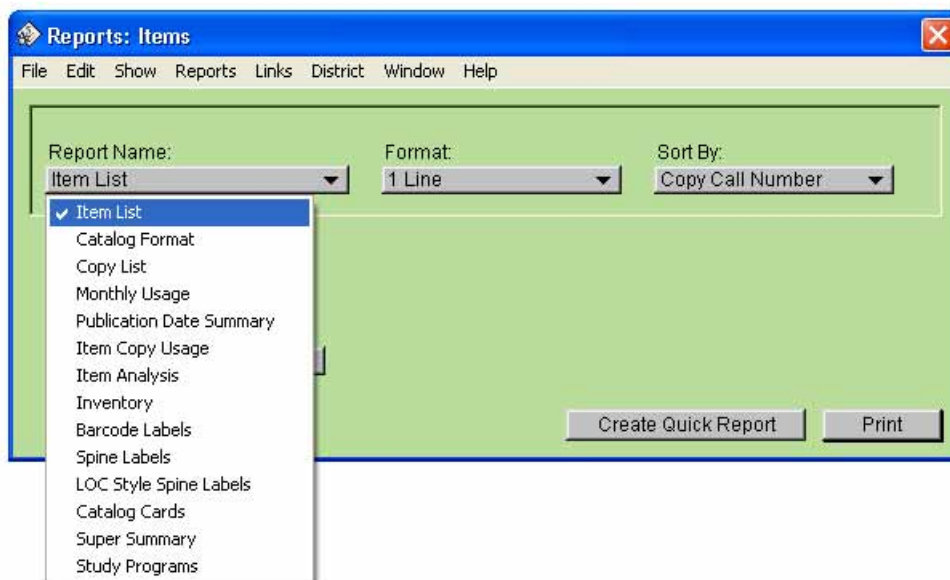
- Step 1. Choose **Item Reports** from the **Reports** drop-down menu.
- Step 2. Choose the type of report you want from the **Report Name** drop-down menu.
- Step 3. Choose whether you want to have your report **Simple** or **Detailed** by selecting from the **Format** drop-down menu.
- Step 4. Choose the order by which you want this report sorted under the **Sort By** drop-down menu.
- Step 5. Use the **Select By** drop-down menu to select what item record information to include in this report.
- Step 6. Click on the **Print** button to prepare the report.

The following sections describe each of Alexandria's **Item Report Names**, **Formats**, **Sort By**, and **Select By** options.



## Item List

These reports are used to view title information for the records in your collection.



## Item List Report Formats

**1 Line**—The report contains basic information about each selected title. Use this report when minimal information is required.

**Summary**—A simple report compiled in a compact format with one or two lines per title. The report contains everything found in the 1-line report, but the information is easier to read. Use this report when minimal information is required.

**Detailed**—A report with full title information, including each item's call number, title, author, place of publication, publisher, date of publication, sequence number, LCCN, ISBN, policy. This format also includes information for each copy, including copy number, barcode number, accession date, vendor, cost, and location. Two or three item records can fit on each page. Use this report to verify data entry or as a substitute to your card catalog.

**MARC**—A report showing each title's MARC record in MicroLIF format.

**Brief Bibliograph**—This is a simple report which contains only a title, call number, and summary. Use this format when a reading list with summary is desired.

## Item List Report Sort By Options

See page 415 for complete and detailed descriptions of Item Reports **Sort By** options.

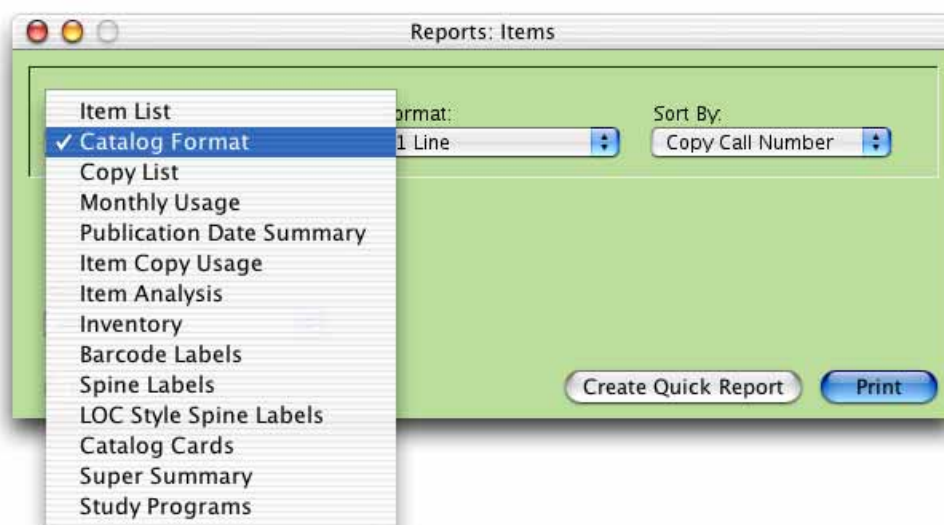
## Item List Report Select By Options

See page 416 for complete and detailed descriptions of Item Reports **Select By** options.



## Catalog Format

These reports are formatted for creating item catalogues (usually used for audio visual materials).



### Catalog Format Report Formats

**1 Line**—A summary title list in a column format. This report includes each copy's title and barcode number.

**Titles**—A single-line summary title list in a three-column format that includes title information; including title, publication, year, publisher, extent, summary, series, interest codes, and call number.

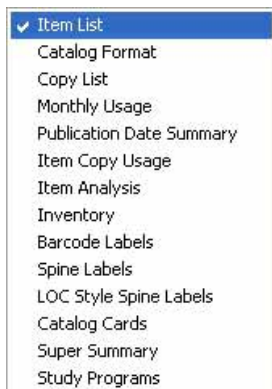
**Copies**—A summary title list in a three-column format that includes title information and the copy barcode number.

### Catalog Format Report Sort By Options

See page 415 for complete and detailed descriptions of Catalog Format **Sort By** options.

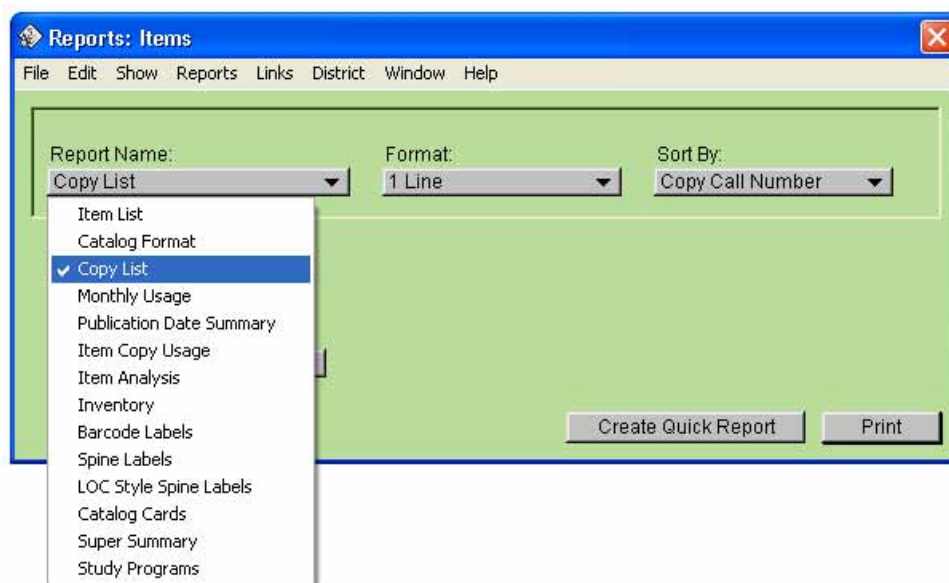
### Catalog Format Report Select By Options

See page 416 for complete and detailed descriptions of Catalog Format **Select By** options.



## Copy List

These reports are used to display copy-specific information.



### Copy List Format Options

**1-Line**—A simple report with one line of information for each selected copy. The report includes each copy's call number, title, copy number, barcode number, life-to-date use, and date of last use.

**Simple, with Barcodes**—A two-column report that includes each copy's title and call number in the first column, and author and barcode number in the second.

**With Summary**—A simple report that includes each copy's call number, title, copy number, and barcode number. Under each title, this report also shows the item summary.

**Detailed**—A detailed report that includes the following information for each selected copy: call number, title, author, copy number, barcode number, vendor, cost, (purchase & replacement), collection, funding, location, and accession date. This report is similar to the detailed item list, but includes information for each copy of a title.

**Weeding List**—A detailed report that includes each copy's call number, title, publication year, barcode, year to date use, and last date used. This format is useful for librarians to quickly look and see what items are being used and how old they are. This can help them determine whether an item should be removed from the collection.

### Copy List Sort By Options

See page 415 for complete and detailed descriptions of Copy List **Sort By** options.

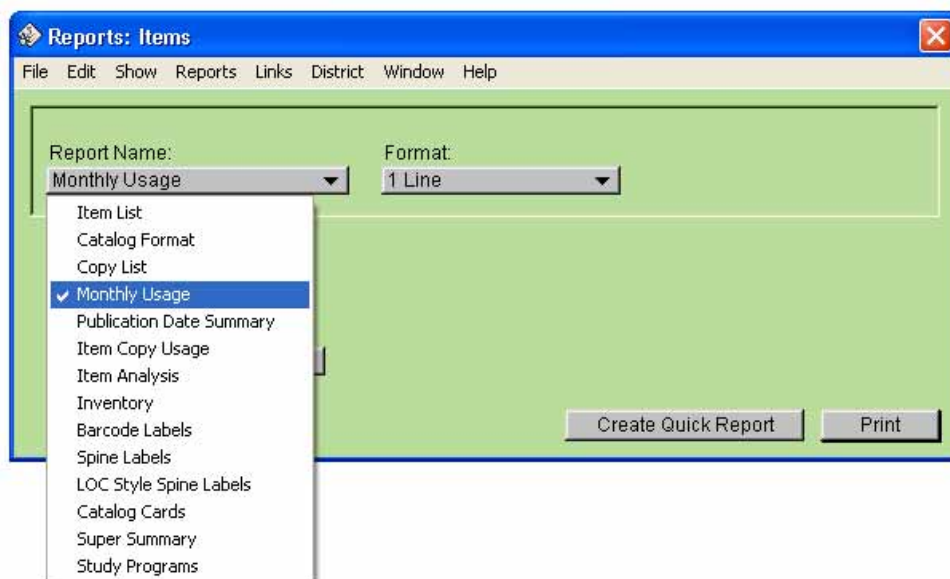
### Copy List Select By Options

See page 416 for complete and detailed descriptions of Copy List **Select By** options.



## Monthly Usage

Use these reports to view how often the selected Titles were used on a monthly basis.



## Monthly Usage Report Formats

**1 Line**—Prepares a summary report over the selected range of the title usage within the past twelve months. Use this report to get a summary of how often titles in this range are getting used. For example, if your management or administration is trying to decide where to spend additional funds for new items, you might prepare a report showing that certain areas of the collection are experiencing heavy usage and, therefore, should get further development funds.

**Detailed**—Prints all the statistical details for the **Monthly Usage** report. Where the summary report only prints the totals for the entire range, this report prints raw data for every title in the range.

**Super Summary Classifications**—This format shows month by month how many items were checked out separated by **Super Summary** classification.

## Monthly Usage Sort By Options

There are no Sort By options available for this report when using **1-Line** and **Super Summary Classifications** formats. See page 415 for **Detailed** descriptions of Monthly Usage **Sort By** options.

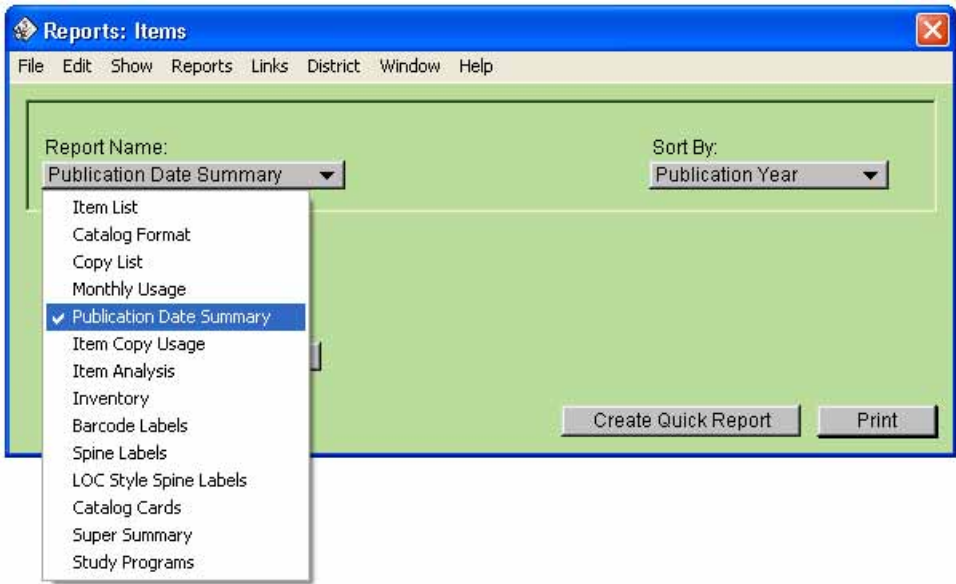
## Monthly Usage Select By Options

See page 416 for complete and detailed descriptions of Monthly Usage **Select By** options.

- ✓ Item List
- Catalog Format
- Copy List
- Monthly Usage
- Publication Date Summary
- Item Copy Usage
- Item Analysis
- Inventory
- Barcode Labels
- Spine Labels
- LOC Style Spine Labels
- Catalog Cards
- Super Summary
- Study Programs

## Publication Date Summary

A report that includes the number of items published each selected year, and the number of times these items have been checked out during the current year and life-to-date. Use this report to determine the age of the items in your collection.



### Publication Date Summary Sort By Options

**Publication Year**—Create a report that sorts items by the year they were published.

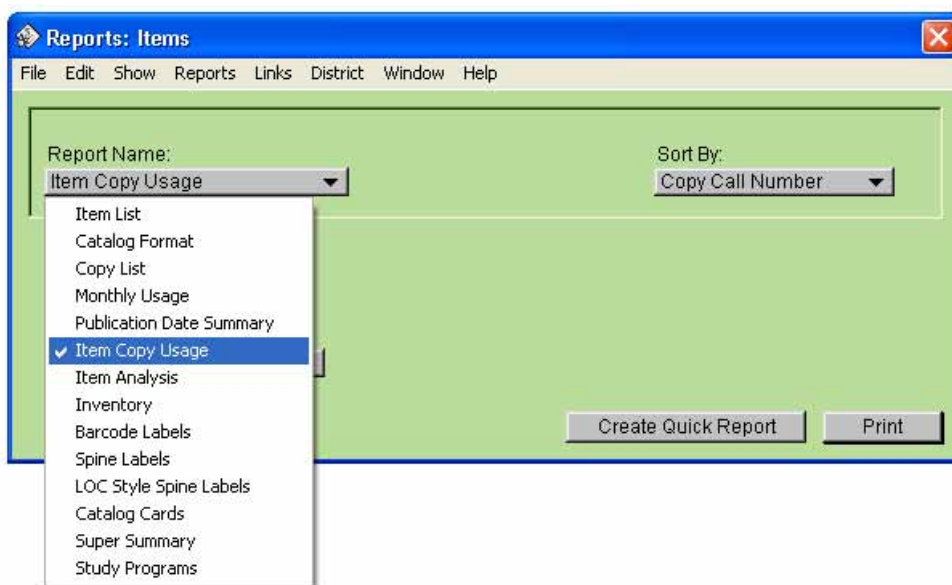
### Publication Date Summary Select By Options

See page 416 for complete and detailed descriptions of Publication Date Summary **Select By** options.



## Item Copy Usage

Reports on usage levels of individual copies in the collection. This can help determine how much each copy has been used.



## Item Copy Usage Sort By Options

See page 415 for complete and detailed descriptions of Item Copy Usage **Sort By** options.

## Item Copy Usage Select By Options

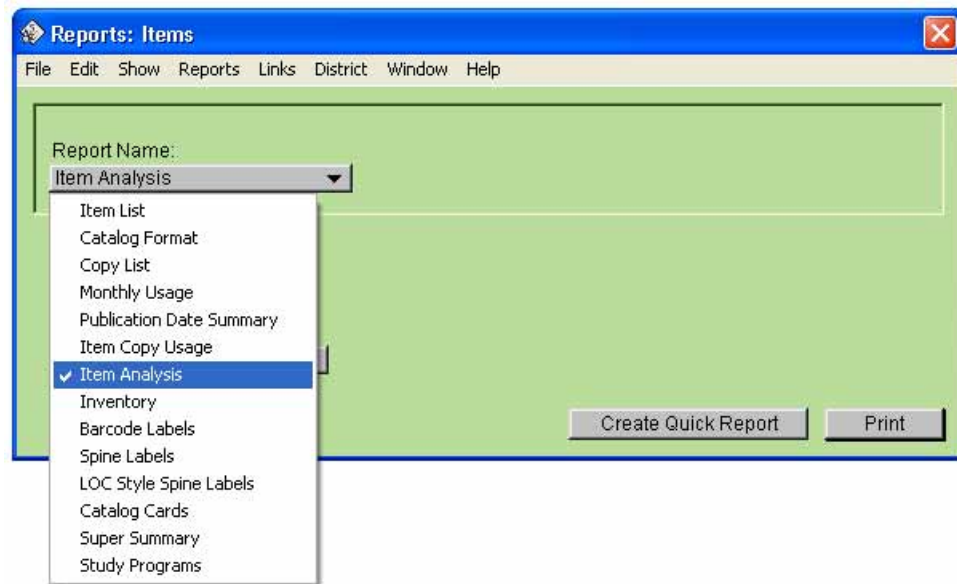
See page 416 for complete and detailed descriptions of Item Copy Usage **Select By** options.





## Item Analysis

Counts the items and copies within the selected range. Use this report to determine how many items/copies you have within selected areas of your collection. It helps you answer questions like “How many fiction books do we have?” and “How many books in the 100’s do we have?”



There are no **Format** or **Sort By** options for this report type.

### Item Analysis Select By Options

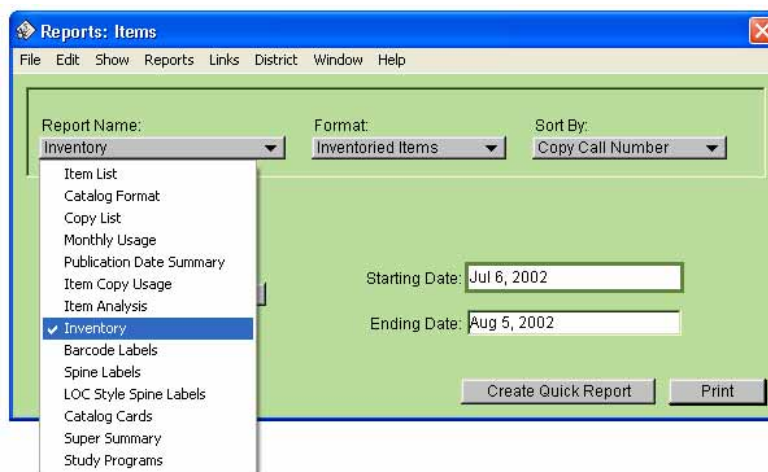
See page 416 for complete and detailed descriptions of **Select By** options.





## Inventory

These reports are used for inventory purposes. An inventory date range is generally required to run these reports. Items with an inventory date in the past month are considered “inventoried.”



## Inventory Report Formats

**Inventoried Items**—A report listing all items whose inventory date falls between a specified date range. The report includes each item’s call number, title, barcode number, inventory date, transaction status, and funds.

**Not Inventoried Items**—A report of items that have not been inventoried within a specified date range. Every copy has an inventory date that specifies when it was last physically known to have been in the library. Performing inventory and checking in (or out) renews this date. For best results, be sure to enter today’s date as the **Ending Date**. You *can* generate reports for any given date range, but keep in mind that items have only one (most recent) inventory date. Therefore, if an item that was missing three months ago has recently been found, it will not appear as missing in any reports you generate for that time period. This report includes each item’s call number, title, barcode number, inventory date, transaction status, and funds.

**Lost Items Inventoried**—A report listing all items within a specified inventory date range (that is, checked out to Patron #1). If the item was inventoried, it should be somewhere in the library.

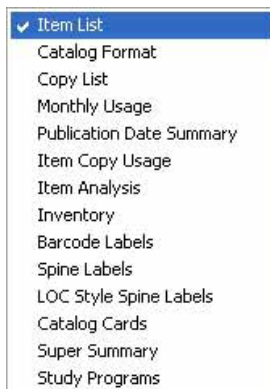
**Inventory Statistics Summary**—All items within the selected range are counted, and a single-page report specifies how many items have been inventoried, how many have not, and how many lost items have been located. Use this report to determine your current inventory status.

## Inventory Sort By Options

See page 415 for complete and detailed descriptions of Inventory Sort By options.

## Inventory Select By Options

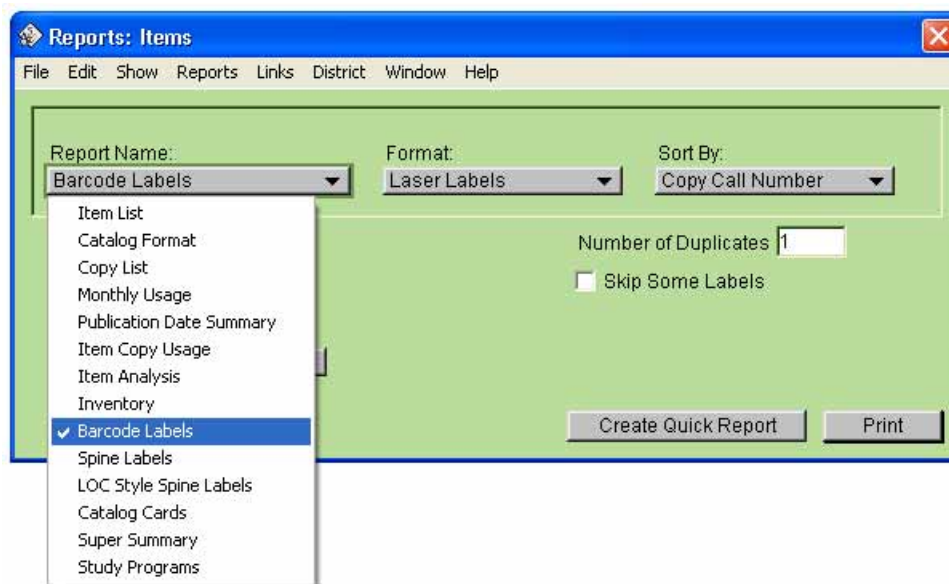
See page 416 for complete and detailed descriptions of Inventory Select By options.



## Barcode Labels

This prints a barcode label for each selected item. You can only print barcode labels for items already in your collection. To print barcode labels for temporary items, select **Special Reports** under the **Reports** menu. Other information on the label includes the item's title, barcode number and call number. This report is designed for Sheet Feed printers. Use **COMPanion's Laser Labels** for perfect results. If you want to print more than one barcode label at a time, enter the number you want in the **Number of Duplicates** field.

You can check **Skip Some Labels** if you don't want the labels to print starting on the upper left corner or if you don't want them to print consecutively. A window will appear, displaying the label sheet layout; click on the labels that you want to skip.



## Barcode Labels Report Formats

**Laser Labels**—Prints barcode labels on a three across format (starting from 0 unless otherwise specified). This format allows you to add one custom line of text to the top of your report.

**2 Custom Line Laser Labels**—Prints barcode labels on a three across format (starting from 0 unless otherwise specified). This format allows you to add *two* custom lines of text to the top of your report.

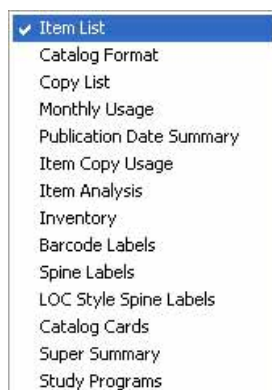
**Smart Barcode**—Print barcode labels with call number, title, and author, but does not show the library name like the **Laser Labels** format.

## Barcode Labels Sort By Options

See page 415 for complete and detailed descriptions of Barcode Labels Sort By options.

## Barcode Labels Select By Options

See page 416 for complete and detailed descriptions of Barcode Labels Select By options.

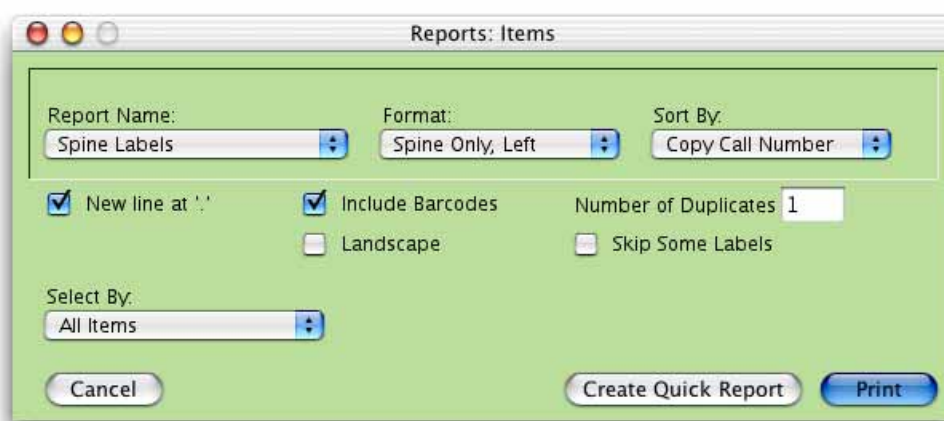


## Spine Labels

These reports are designed for sheet feed printers. Paper stock for these forms can be purchased from COMPAnion. More than one spine label can be printed at a time; enter the number you want in the **Number of Duplicates** checkbox. If you want to include the item barcode number, mark the Include Barcodes checkbox. If you would prefer the page be printed in a “landscape” format, mark the **Landscape** checkbox.

Use the **New line at “.”** checkbox if you have, let’s say, a label that is 123 . 45; when it prints, the period acts as a carriage return and will print everything that comes after the “.” on a new line.

You can check **Skip Some Labels** if you don’t want the labels to print starting on the upper left corner or if you don’t want them to print consecutively. A window will appear, displaying the label sheet layout; click on the labels that you want to skip.



## Spine Labels Report Formats

**Spine Only, Left**—Spine labels with the label text left justified.

**Spine Only, Centered**—Spine labels with the label text center justified.

**Spine Only, Left (Large)**—Exactly the same as the **Spine Only, Left** format, only in a larger font.

**Spine Only, Centered (Large)**—Exactly the same as the **Spine Only, Centered** format, only in a larger font.

**Envelope and Spine, Left**—Combination envelope and spine labels with the text left justified. Barcodes will only appear on the spine label.

**Envelope and Spine, Centered**—Combination envelope and spine labels with the text center justified. Barcodes will only appear on the spine label.

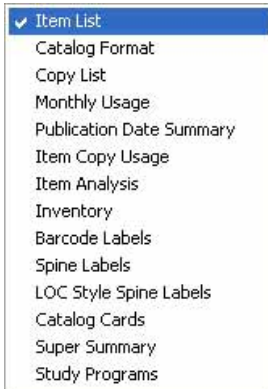
**Horizontal Spine Labels**—Spine labels with the label text running horizontal across the spine.

## Spine Labels Sort By Options

See page 415 for complete and detailed descriptions of Spine Labels **Sort By** options.

## Spine Labels Select By Options

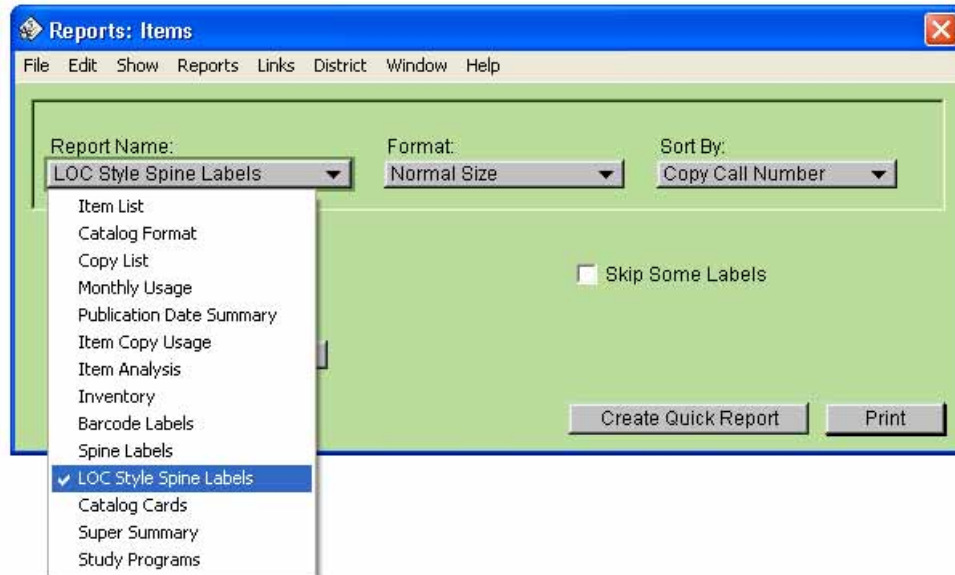
See page 416 for complete and detailed descriptions of Spine Labels **Select By** options.



## LOC Style Spine Labels

**These** labels insert carriage returns between the call number prefix, major classification, subclassification, cutter and publication date and copy number.

You can check **Skip Some Labels** if you don't want the labels to print starting on the upper-left corner or if you don't want them to print consecutively. A window will appear, displaying the label sheet layout; click on the labels that you want to skip.



### LOC Style Spine Labels Report Formats

**Normal Size**—Prints to standard spine label stock.

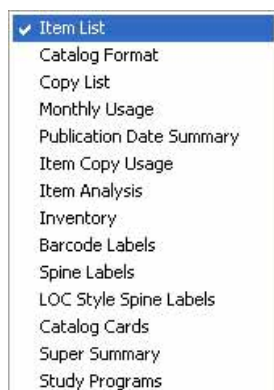
**Barcode Label Size**—Prints barcode labels in a landscape orientation.

### LOC Style Spine Labels Sort By Options

See page 415 for complete and detailed descriptions of LOC Style Spine Labels Sort By options.

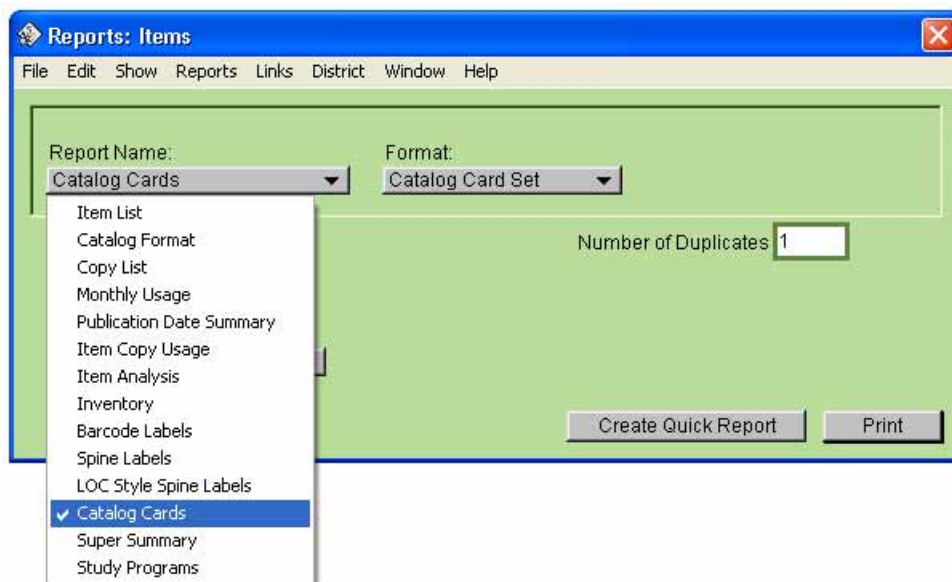
### LOC Style Spine Labels Select By Options

See page 416 for complete and detailed descriptions of LOC Style Spine Labels Select By options.



## Catalog Cards

Catalog card printing requires “sheet-feed” printers such as laser and inkjet printers. Paper stock for these forms can be purchased from COMPanion. More than one catalog card can be printed at a time; enter the number you want in the **Number of Duplicates** field.



## Catalog Cards Report Formats

**Catalog Card Set**—Prints title, author, subject, series, and shelf list cards for each title selected.

**Shelf List Card**—Only prints the shelf list card for the specified titles. If there are several copies of the title, additional cards will automatically be printed.

**Title Card**—Only prints the title card for the specified titles.

**Author Card**—Only prints the author cards for the specified titles. A separate card will be printed for each name entered into the **Author** field.

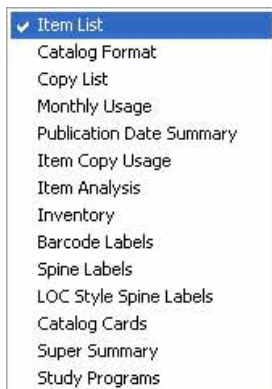
**Subject Card**—Only prints the subject cards for the specified titles. A separate card will be printed for each subject listing.

**Series Card**—Only prints the series card for the specified titles. If there is no data in the **Series** field, no card will be printed.

## Catalog Card Select By Options

See page 416 for complete and detailed descriptions of Catalog Card **Select By** options.

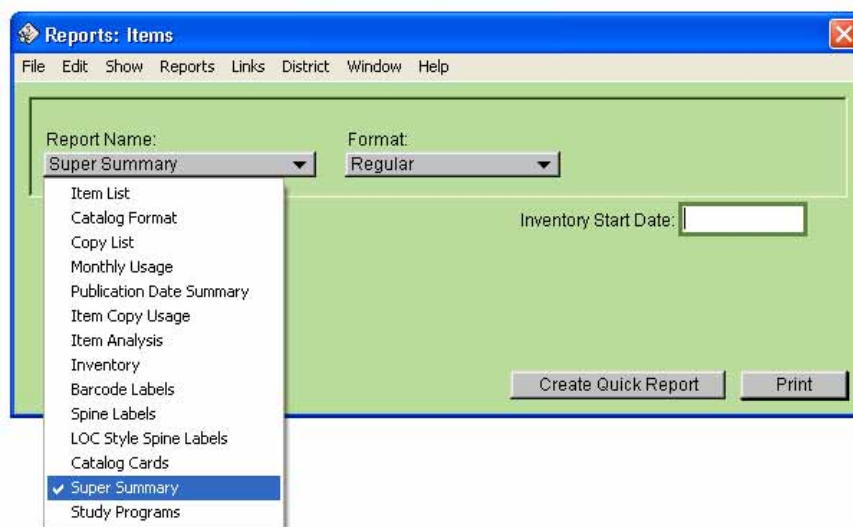




## Super Summary

This report performs a comprehensive analysis of your collection. The default entries are called **Regular Super Summary**, **Ignore Alexandria Call Number Policies**, and **Missouri Super Summary**.

Typically, you'll want to perform the analysis on your entire collection.



## Super Summary Report Formats

Super Summary reports are used to perform detailed analysis of the items in your collection. Typically, the analysis is performed on your entire collection.

**Regular**—The Regular Super Summary performs a detailed analysis of the items in your collection. Statistics are collected based on the financial date range, the last calendar month, and the last twelve months. It collects the following pieces of information:

**Title-Based Statistics**—Only collected for titles with copy records. Title records without copy records are counted separately. Copies that are **Lost** or **Discarded** are NOT included in the calculations except for the lost and discarded counts of the current financial year (see “Orders Preferences” on page 133).

**Title Count**—Total number of titles in the selected group.

**No Copies**—Count of titles that have no copies

**Copyright 2yr**—Count of copies in copyright range of 0-2 years.

**Copyright 3-5yr**—Count of copies in copyright range of 3- 5 years.

**Copyright 6-10yr**—Count of copies in copyright range of 6-10 years.

**Copyright 11-20yr**—Count of copies in copyright range of 11-20 years.

**Copyright 20+yr**—Count of copies in copyright range of 20+ years.

**No Date**—Count of copies with no copyright date.

**Jan-Dec Usage**—Monthly title usage counts for each month. These counts come from the title statistics information record (twelve columns of data, one for statistics in each month.)

**YTD Usage**—Title year-to-date usage over the last 12 months.

**LTD Usage**—life-to-date usage counts for each title.

**Copies**—Total count of copies in a group—except copies which are lost or discarded.

**New**—Count of items with accession dates within a specified date range.

**New Value**—Total value of new copies totaled above.



### NOTE:

Date range for **Lost** and **Discarded** and **New** is specified in Financial Year references under **Orders** preferences.

**Inventoried**—Count of items inventoried within a specified date range. Date range for **Inventoried** is the last calendar month.

**Value**—Total value of inventoried copies above.

**Lost**—Count of items lost within a specified date range. Since this statistic is only over the specified date range, more lost items may be in your inventory.

**Lost Value**—Total value of lost copies counted above.

**Discarded**—Count of items discarded within a specified date range. Since this statistic is only over a specified date range, more **Lost** or **Discarded** items may be in your inventory.

**Discarded Value**—Total value of discarded copies counted above.

**Ignore Alexandria Call Number Policies**—This format ignores the categories that Alexandria assigns to items based on prefixes within a certain prefix range.

**The Missouri Super Summary**—The Missouri Super Summary collects the following pieces of information.<sup>1</sup>

**Holdings**—A count of the number of copies in a selection group.

**Older**—A count of the number of copies with publication dates that are 13 years old (or older) from the end of the current financial year.

**Newer**—A count of the number of copies with publication dates that are less than 13 years old from the end of the current financial year.

**% Newer**—The percentage of items that are newer.

---

1. This data is NOT collected for copies that are **Lost** or **Discarded**.



NOTE:

If you are setting up Alexandria to work like a library, then fiction items that do not have a call number prefix before the cutter (first three letters of the author’s last name) cause the Super Summary to be unaffected for a call number analysis.

Super Summary Statistics Groups

Statistics are collected based on call number and item policy over the entire selection. For call number statistics, numeric sub-divisions are grouped into the following categories for each call number prefix. Numbers with no prefix are shown below.

Standard Super Summary uses these numeric selections:

000-099 (less 092s)	400-499
092 Only	500-599
920 Only	600-699
100-199	700-799
200-299	800-899
300-399	900-999 (less 920s)

Missouri Super Summary uses these numeric selections:

000-319	530-549
320-329	550-559
330-339	560-569
340-359	570-579
360-369	580-609
370-379	610-619
380-389	620-629
390-519	630-999
520-529	

If the call number begins with a **numeric** character, the following is performed.

- All **non-numeric** characters are removed.
- The first **three** numeric characters are kept (up to a decimal point).
- If fewer than **three** digits remain, zeros are padded to the front.
- The following values are considered **Numeric Call Codes**; thus “45 . 24” and “100 . 437” will become “045” and “100.”
- The **Numeric Call Code** is then updated to match the ranges in the selection groups shown on the previous page. Thus, “045” would map to “000-099” in the Standard Super Summary, but in the Missouri Super Summary it gets grouped as “000-319.”



**NOTE:**

Call Number Statistic Groups do not overlap. A copy is only included in *one* group. Thus, "REF 100" goes into group "REF 100-199" but is *not* added to group "100-199"

**NOTE:**

At the same time that call number statistics are collected, the Super Summary examines the policy of each copy and updates statistics across each policy.

In the same way, a group exists which includes all sub-groups, thus resulting in a total count over the item selection criteria.

## Super Summary Call Number Prefix definitions

If the call number begins with an **Alpha** character, the call number prefix is computed based on the prefix of the call number.

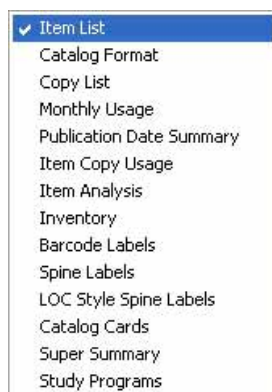
First, all leading **Alpha** characters are collected from the beginning of the call number.

These characters are examined and classified according to the following table (e.g. if there is an E or EZ, it's turned into 'Easy'—call this the **Group Name**). If the numeric characters follow the **Alpha** characters, they are extracted using the numeric character extraction rules shown above. The full **Group Name** is then created by appending the **Group Name** with the **Numeric Call Code**.

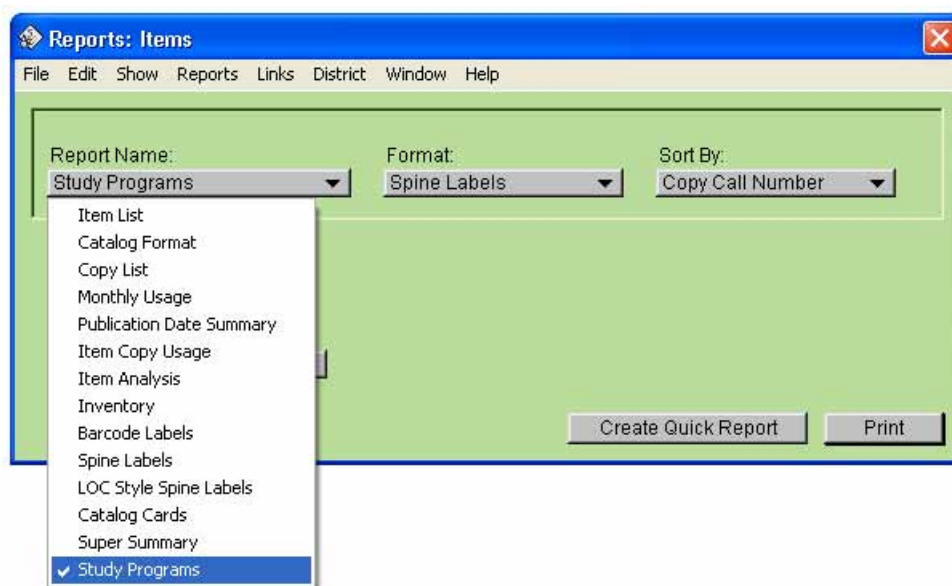
Thus reference books with a call number of "REF 100.000" fall into the analysis group of **Reference 100-199**. If no code exists for a Alpha call number prefix, the group ".Other" is used. Call Numbers that are counted under ".No Text" Call Numbers with no prefix (such as 100.34) fall into group "100-199."

A call number prefix is assigned a name based on a group of prefixes that are mapped into the named group. Call number prefixes are not case sensitive. These following groups are defined for all Super Summary reports. Thus, call numbers that begin with "C" or "CAS" are added to the statistics group "**Cassettes**."

AV Stand-AVS, AV	Non Fiction-NF, NFC, N
Audio Visual-AV, AUD	Opaque Projector-OPQ
Biography-B, BIO, BI	Overhead Projector-OHP
CD ROM-CDR	Oversized-O, OS, BIG, LG, L
Cassette Player-CP	Paperback-PBK, PB
Cassettes-C, CAS	Periodical-MAG, M, PER, P, J, JOR,
Classes-CLA	Picture-P, PIC
Compact Disk-CD	Professional-PRO, PROF
Computer Software-CS	Record Player-RP
Computer-COMP	Recording-REC
Data Display-DDP	Reference-R, REF
Easy NF-ENF	Screen-SCR
Easy-E, EZ, EASY	Slide Projector-SLP
Equipment-EQ, EQU, EQUIP	Slides-SLI
Fiction-F, FIC	Story Collection-S, ST, STO, SC
Film Projector-FP	Study Print-SPR
Filmstrip-FSP, FS, FSK, FSS	Television-TV
Game-GAM	Transparency-TRA
Head Phone-HP	Vertical File-VF, V, PAM
Juvenile Fiction-JF	Video Cassette Recorder-VCR
Juvenile Non Fiction-JN, JNF	Video Disc Player-VDP
Kits-KIT, K, KITS	Video Disk-VD
Laser Disk-LD, LSD	Video-V, VC, VID, VT, VTC
Listening Station-LS	Young Adult-Y, YA
Model-MOD	.No Text-empty call numbers.
Newspapers-NEW, NEWS	



## Study Programs



### Study Program Report Formats

**Spine Labels**—Prints up a spine label that can be used to mark reading program books (such as Accelerated Reader) with the name of the reading program, reading level, interest level, and test number. They are center justified.

**1 Line**—This simple, one-line report format lists books by reading program, call number, title, author, points, and reading level.

### Study Program Sort By Options

See page 415 for complete and detailed descriptions of Study Program Select By option

### Study Program Select By Options

See page 416 for complete and detailed descriptions of Study Program Select By options.

- ✓ Copy Call Number
- Title Call Number
- Policy / Call Number
- Title
- Author
- Barcode
- Publication Year
- Subject Terms
- Full Subject
- Curriculum Code
- Bibliographic Code
- Interest Code
- Series
- Accession Date
- Inventory Date
- Library
- Location
- Shelving
- Funding Source

## Item Reports Sort By Options

Use the **Sort By** drop-down menu to select the order in which you want the items included in your report. For example, if you want an alphabetic list, sort by title.

The following is a complete list of **Sort By** options for **Item Reports**.

**Copy Call Number**—This selection sorts by call number, then primary author, and then title. Call number sorts from left to right, so a call number of 100 is sorted before 20. To ensure numerical sorting works for you, all numbers must have leading zeros. For example, a call number of 020 is sorted before 100.

**Title Call Number**—This selection sorts by call number, then primary author, and then title. Call number sorts from left to right, so a call number of 100 is sorted before 20. To ensure numerical sorting works for you, all numbers must have leading zeros. For example, a call number of 020 is sorted before 100.

**Policy/Call Number**—This report is sorted alphabetically by policy name, and within each policy by call number. Each policy begins on a new page.

**Title**—This report is sorted alphabetically by title. Articles such as 'A', 'An' or 'The' are ignored when specified as such in the MARC record. For example, *The Wizard of Oz* will be sorted under W.

**Author**—This report is sorted alphabetically. To ensure that the author names sort correctly, make sure all author names are entered using the same format: "Last Name, First Name." If a title has more than one author, it will appear under each authors listing.

**Barcode**—This report is sorted numerically by barcode.

**Publication Year**—This report is sorted numerically by the publication year field on the title record. This is useful if you want to compile a list of when items in the collection were published.

**Full Subject**—This sorts by the entire subject heading

**Curriculum Code**—Sort by curriculum code and then by call number.

**Bibliographic Code**—Sort by bibliographic code and then by call number.

**Interest Code**—Sort by interest code and then by call number.

**Series**—Sorts by series name (e.g. Hardy Boys, Goosebumps, etc.).

**Accession Date**—Sort by accession date and then by call number.

**Inventory Date**—Sort by inventory date and then by call number.

**Library**—Sorts by where items are housed.

**Location**—Sorts by where inside the library particular items are held.

**Library**—Sort by copy collection code and then by call number. Each copy collection code starts on a new page.

**Shelving**—A second location indicator option if you want to further detail the location of items on specific shelves at your location (note: this terminology can be customized in your **Item Management** preferences under **Caption for Shelving Location**).

**Funding Source**—Sort by copy fund code and then by call number. Each copy fund code begins on a new page (note: this terminology can be customized in your **Item Management** preferences under **Caption for Special Funds**).

☒ All Items

Accession Date  
 Author  
 Barcode List  
 Barcode Range  
 Bibliographic Code  
 Copy Call Number  
 Copy Last Used Date  
 Copy Library  
 Copy Location  
 Copy Policy  
 Copy Sequence #  
 Copy Shelving  
 Copy Status  
 Curriculum Code  
 Don't Show in Researcher  
 Funding Source  
 Interest Code  
 Inventory Date  
 Item Call Number  
 Item Policy  
 Medium  
 No Last Used Date  
 Not Inventoried Date  
 Publication Year  
 Publisher  
 Series  
 Study Programs  
 Subject Terms  
 Title  
 Title Sequence #

## Item Reports Select By Options

Use the **Select By** drop-down menu to select which items you want to include in the report. For example, you can select items in a certain barcode or call number range.

You can enter up to six values for selection criteria using **AND**, **OR**, and **AND NOT** (Boolean Logic). When you choose values in the selection drop-down menus, other selections appear and prompt you for **Starting With** and **Ending With** values.

The following is a list of selectable values for item reports:

**All Items**—The report includes all items.

**Accession Date**—This report includes copies added to your system in the date range you specify.

**Author**—This report includes items with authors in the alphabetic range you specify.

**Barcode Range**—This report includes copies in the barcode range you specify.

**Barcode List**—This report includes all items matching the barcode you enter or scan. You can select all the barcodes in it later with another report.

**Bibliographic Code**—This report includes items classified under the bibliographic copy codes you specify.

**Copy Call Number**—This report covers copies within the call number range you specify. Call numbers are ordered from left to right, so 100 comes before 20, but 020 comes before 100.

**Copy Last Used Date**—This option selects copies that have been used over the specified date range.

**Copy Library**—This report includes items classified within the collection you specify.

**Copy Location**—This report includes items classified with the location you specify.

**Copy LTD Usage**—This report includes the item's LTD usage (i.e. the number of times the copy has been circulated).

**Copy Policy**—This includes copies within the policy range you specify.

**Copy Sequence #**—This report includes copies with sequence numbers within your specified range. Copies are assigned a sequence number in the order that they are entered into the system.

**Copy Shelving**—This is a third option for keeping track of item locations. It allows librarians to get very specific about the location of a book.

**Copy Status**—This allows you to limit the report to items that are unavailable, lost, discarded, checked out, on reserve, or on in-stock hold.

**Curriculum Code**—This report includes items classified with the curriculum keywords you specify.

**Don't Show in Researcher**—This option allows you to select items based on the status of the **Don't Show in Alexandria Researcher** checkbox. You can select either the hidden or visible items.

**Medium**—This report includes items classified with the medium code you specify.

**Funding Source**—This report includes items with the copy funds code you specify.

☒ All Items

Accession Date  
 Author  
 Barcode List  
 Barcode Range  
 Bibliographic Code  
 Copy Call Number  
 Copy Last Used Date  
 Copy Library  
 Copy Location  
 Copy Policy  
 Copy Sequence #  
 Copy Shelving  
 Copy Status  
 Curriculum Code  
 Don't Show in Researcher  
 Funding Source  
 Interest Code  
 Inventory Date  
 Item Call Number  
 Item Policy  
 Medium  
 No Last Used Date  
 Not Inventoried Date  
 Publication Year  
 Publisher  
 Series  
 Study Programs  
 Subject Terms  
 Title  
 Title Sequence #

**Interest Code**—This report includes items classified with the interest level or reading level you specify.

**Inventory Date**—This report includes copies inventoried during the date range you specify.

**Item Call Number**—This report includes items with the item call number you specify.

**Item Policy**—This report includes items with the item or title policy.

**Medium**—This reports includes items with a particular medium type assigned.

**No Last Used Date**—This report selects copies that have never circulated.

**Not Inventoried Date**—This report can be used to find items that were not marked as inventoried in a particular date range. This makes selecting items to be marked as **Lost** from inventory much easier.

**Publication Year**—Selects items with publication years between any given range. Publication years must be specified by a four-digit number such as 1979 or 2002.

**Publisher**—Selects items with publishers in the given range.

**Series**—Selects items with series in the given range.

**Study Programs**—This report includes reading programs assigned to items (Accelerated Reader, Reading Counts, etc.).

**Subject Terms**—This report includes items classified with the subjects you specify.

**Title**—This report includes titles within an alphabetical title range you specify.

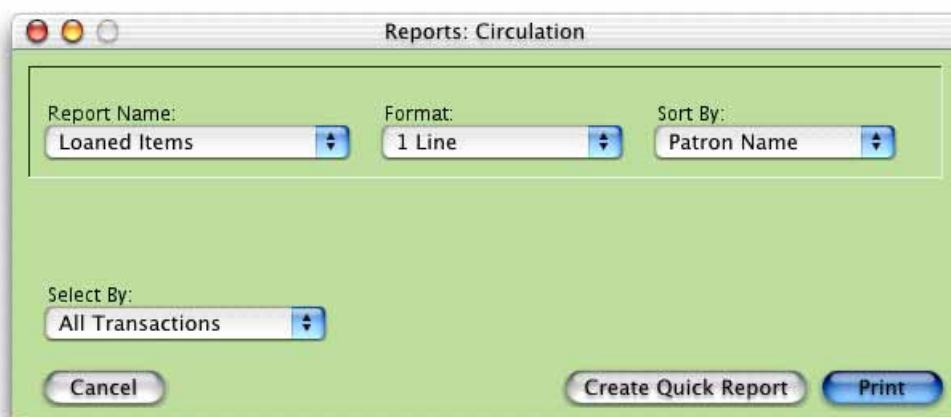
**Title Sequence #**—This report includes items with sequence numbers between the range you specify. Titles are assigned a sequence number in the order they are entered into the system.



# Circulation Reports

## Preparing Circulation Reports

Circulation reports gather information from Alexandria's transactions and statistics records and presents it in a number of different formats. You can get lists of loaned items, overdue items, fines, requests, reservations, lost items, and much more. In Alexandria terminology, circulation lists are designed for use by the librarian and circulation notices are designed for distribution to patrons.



To prepare a **Circulation Report**, follow these steps:

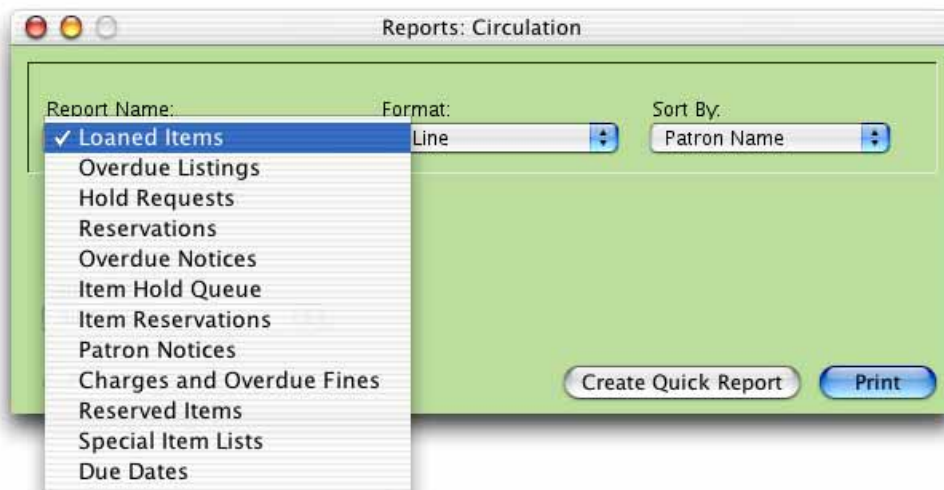
- Step 1. Choose **Circulation Reports** from the **Reports** menu.
- Step 2. Choose the type of report you want from the **Report Name** drop-down menu.
- Step 3. Choose how you want your report **Format** displayed.
- Step 4. Choose the **Sort By** order for this report.
- Step 5. Use the **Select By** drop-down menu to select which records to include in the report.
- Step 6. Click the **Print** button to prepare the report.



- ✓ Loaned Items
- Overdue Listings
- Hold Requests
- Reservations
- Overdue Notices
- Item Hold Queue
- Item Reservations
- Patron Notices
- Charges and Overdue Fines
- Reserved Items
- Special Item Lists
- Due Dates

## Loaned Items

These reports prepare lists for library use. Only loaned items are included in the report. Items loaned to special patrons (barcode numbers between 1 and 50) or inactive patrons are not included in this report.



### Loaned Items Report Formats

**1 Line**—Includes primary transaction information for each loaned item. The report includes each patron's name and barcode, and each item's title, call number, barcode and due date. An asterix indicates overdue items.

**1 Line Landscape**—This report is the same as the 1 Line report, but is in a landscape format. This allows more room for displaying the title.

**Detailed**—Includes full transaction information for each loaned item. All available information is included in this report.

**Complete**—This report format allows the librarian to include charges, fees, and fines that might be owed by the student.

### Loaned Items Sort By Options

See page 433 for complete and detailed descriptions of Loaned Items **Sort By** options.

### Loaned Items Select By Options

See page 434 for complete and detailed descriptions of Loaned Items **Select By** options.



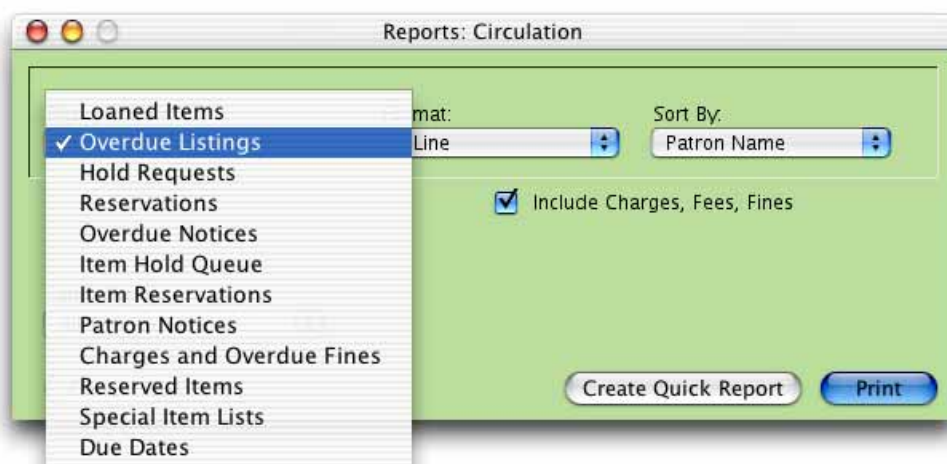


## Overdue Listings

These reports prepare lists for library use. Only overdue items are included in the report. Items loaned to special patrons (barcode numbers between 1 and 50) or inactive patrons are not included in these reports.

This report includes an implicit selection of any overdue item. If you use a selection that uses the **Due Date**, that selection will be used rather than the implicit values.

By default, the **Include Charges, Fees, Fines** box is checked.



## Overdue Listings Report Formats

**1 Line**—Includes primary transaction information for each patron with overdue items. It displays the patron's name, barcode and phone number along with the number of overdue items, those currently checked out and the patron's current fine balance.

**Detailed**—Includes full transaction information for each overdue item. All available information is included. This report includes each patron's name and barcode number, phone number, each item's title, barcode number, call number, cost, due date, and the number of days the item is overdue.

**Posting List**—Includes name, number of overdue items and charges due. This report can be posted in the library to inform patrons that have overdue items and charges.

**Posting List - Detailed**—This format allows you to actually see the title of the items that are overdue as compared to the **Posting List**, which only shows the number of items that are overdue. It also shows the homeroom of the patron and the due date of the item, as well as the reason the patron owes a fee.

## Overdue Listings Sort By

See page 433 for complete and detailed descriptions of Overdue Listings **Sort By** options.

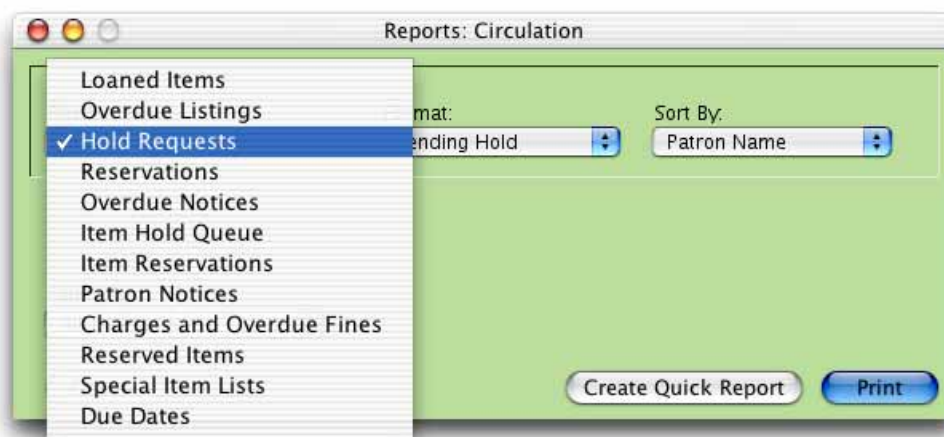
## Overdue Listings Select By Options

See page 434 for complete and detailed descriptions of Overdue Listings **Select By** options.

- ✓ Loaned Items
- Overdue Listings
- Hold Requests
- Reservations
- Overdue Notices
- Item Hold Queue
- Item Reservations
- Patron Notices
- Charges and Overdue Fines
- Reserved Items
- Special Item Lists
- Due Dates

## Hold Requests

These reports prepare hold request and in-stock hold lists.



### Hold Requests Report Formats

**Pending Hold**—Only includes hold requests that are currently pending. For pending holds, the request date is the date on which the hold was placed. The expiration date is the date the request expires. Alexandria automatically removes expired hold requests at the beginning of each day.

**In-Stock**—A report that lists selected items being held for patrons. Only in-stock requests are selected. For in-stock requests, the in-stock date is the date on which the item first became available for a patron. The expiration date is the date on which the request expires. Alexandria automatically removes expired requests at the beginning of each day.

### Hold Request Sort By Options

See page 433 for complete and detailed descriptions of Hold Request Sort By options.

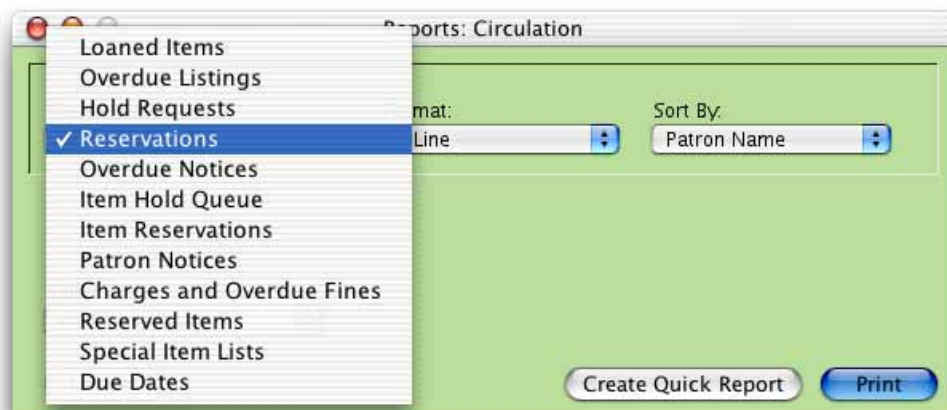
### Hold Request Select By Options

See page 434 for complete and detailed descriptions of Hold Request Select By options.



## Reservations

For Reservations, the request date is the date on which the reservation was placed and the Reservation Begin Date is the date on which the reservation begins. For a listing of the reservations scheduled for today, select this report and **Select by** a **Reservation Begin Date** of today's date.



## Reservations Report Formats

**1 Line**—Prepares a tabular report with all reservation information.

**Labels**—Prepares **Reservation Labels** using the Label stock provided by COMPanion. Includes reservation dates, item barcode, title, and patron's name and address.

## Reservations Sort By Options

See page 433 for complete and detailed descriptions of Reservations Sort By options.

## Reservations Select By Options

See page 434 for complete and detailed descriptions of Reservations Select By options.

- ✓ Loaned Items
- Overdue Listings
- Hold Requests
- Reservations
- Overdue Notices
- Item Hold Queue
- Item Reservations
- Patron Notices
- Charges and Overdue Fines
- Reserved Items
- Special Item Lists
- Due Dates

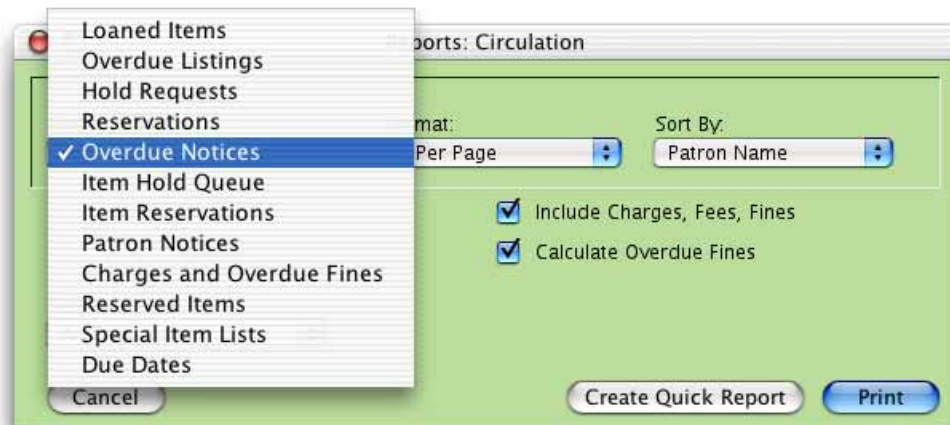
## Overdue Notices

These notices are sent to patrons to inform them that they have overdue items and should return them to the library. You can change the text of these notices using the **Letters** preference on the **Circulation** tab of the **Local Circulation** preference window.

Overdue notices are generated for all overdue items unless you limit them by selecting a range of due dates. For example, you can set the date range to generate overdue notices only for items overdue by more than a week.

If you select **Include Charges, Fees, Fines**, then charges, fees and fines are included in the reports. Otherwise, they are ignored.

If you select **Calculate Overdue Fines**, then overdue fines are included in the reports. Otherwise, they are ignored.



## Overdue Notices Report Formats

The following are the formats for overdue notices:

**4 per Page**—Overdue slips printed 4 per page. One slip is printed for each overdue item or charge. This is a good format to use when each patron has only 1 or 2 overdue items. The slip includes the patron's name, barcode number, location, level, 2nd location, government ID, library balance, and the item's title, barcode number, author, call number, replacement cost, due date, return date, daily fine/fee rate, and fine balance for each item.

**2 per Page**—Overdue slips printed 2 per page. One slip is printed for each patron with an overdue item. Up to 4 items can be included on each slip. If patrons have several overdue items, this format is preferable over the 4 per page format—as it saves paper. The slip includes the patron's name, barcode number, location, 2nd location, government ID, level, policy, and library balance, and the item's title, barcode number, call number, date, fine/fee amount by item, amount paid by item, fine/fee balance by item, and replacement cost. It also includes the total number of items the patron has overdue and the fine/fee amount due on the slip.

**NOTE:**

You must have your  
Email preferences  
correctly configured for  
this to work.

**Self Mailer**—An overdue notice in letter format designed to be folded and mailed without an envelope. If there are several overdue items, the letter runs onto a second page. The letter includes the patron's name, address, location, and barcode number, and each item's title, barcode number, due date, return date, number of fine/fee days calculated, fine/fee rate, total balance by item and replacement cost. This format is excellent if notices are mailed. Just fold, staple and stamp—the return and patron addresses are automatically printed on the mailer.

**Overdue Letters with Summary**—An overdue notice in letter format. This letter includes all items a patron has overdue. If there are several overdue items, the letter runs onto a second page. The letter includes the patron's name, address, barcode number, and each item's title, author, barcode number, call number, due date, return date, daily fine/fee rate, the number of fine/fee days totaled, the total balance due by item, and the total balance due for all items. After the last letter, a summary is displayed.

**Overdue Letters**—Same as the previous report, but without the summary page at the end.

**Overdue Letters, to Parents**—Same as the previous report, but is addressed "To the Parents or Guardian of" rather than the actual patron.

**Mailing Labels - One Across**—This format prints overdue notice mailing labels on a page with labels printed in one column at a time and down. These labels can be created for the patron or for the patron's guardian (if you check the **Address to Parent/Guardian** box).

**Mailing Labels - Three Across**—This format prints overdue notice mailing labels on a page with three labels across and ten down. These labels can be created for the patron or for the patron's guardian (if you check the **Address to Parent/Guardian** box). Use the **Skip Some Labels** checkbox to indicate areas on the label sheet not to be printed.

**Email**—An overdue notice sent to the patron using the email address in the patron record. A summary report is prepared so you have record of which patrons were sent email notification.

## Overdue Notices Sort By Options

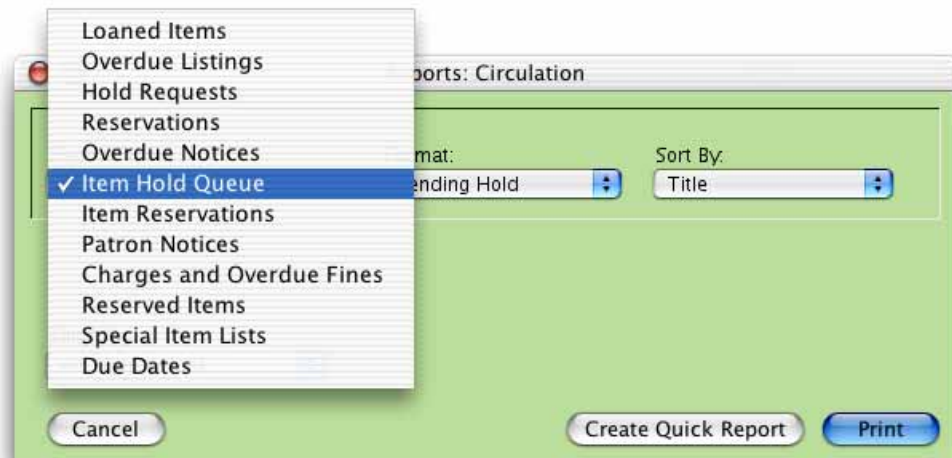
See page 433 for complete and detailed descriptions of Overdue Notices **Sort By** options.

## Overdue Notices Select By Options

See page 434 for complete and detailed descriptions of Overdue Notices **Select By** options.

- ✓ Loaned Items
- Overdue Listings
- Hold Requests
- Reservations
- Overdue Notices
- Item Hold Queue
- Item Reservations
- Patron Notices
- Charges and Overdue Fines
- Reserved Items
- Special Item Lists
- Due Dates

## Item Hold Queue



### Item Hold Queue Report Formats

**Pending Hold**—Only includes hold requests that are currently pending. For pending holds, the request date is the date on which the hold was placed. The expiration date is the date the request expires. Alexandria automatically removes expired hold requests at the beginning of each day.

**In-Stock**—A report that lists selected items being held for patrons. Only in-stock requests are selected. For in-stock requests, the in-stock date is the date on which the item first became available for a patron. The expiration date is the date on which the request expires. Alexandria automatically removes expired requests at the beginning of each day.

### Item Hold Queue Sort By Options

**Title**—This report is sorted alphabetically by title. Articles such as 'A', 'An' or 'The' are ignored when specified as such in the MARC record. For example, *The Wizard of Oz* will be sorted under W.

**Author**—This report is sorted alphabetically. To ensure that the author names sort correctly, make sure all author names are entered using the same format: "Last Name, First Name." If a title has more than one author, it will appear under each author's listing.

**Copy Call Number**—This selection sorts by call number, then primary author, and then title. Call number sorts from left to right, so a call number of 100 is sorted before 20. To ensure numerical sorting works for you, all numbers must have leading zeros. For example, a call number of 020 is sorted before 100.

### Item Hold Queue Select By Options

**All Transactions**—All transactions are examined using the selection criteria for each report format.

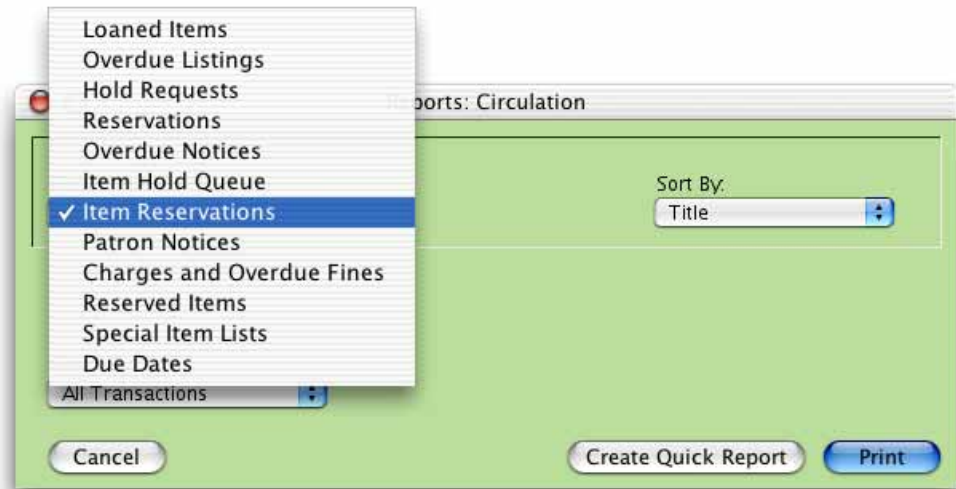
**Item Barcode**—This report includes items within the barcode range you specify.

**Item Title**—This report includes item titles within the alphabetical range you specify.





## Item Reservations



There are no Item Reservations Report Formats.

### Item Reservations Sort By Options

**Title**—This report is sorted alphabetically by title. Articles such as 'A', 'An' or 'The' are ignored when specified as such in the MARC record. For example, *The Wizard of Oz* will be sorted under W.

**Author**—This report is sorted alphabetically. To ensure that the author names sort correctly, make sure all author names are entered using the same format: "Last Name, First Name." If a title has more than one author, it will appear under each authors listing.

**Copy Call Number**—This selection sorts by call number, then primary author, and then title. Call number sorts from left to right, so a call number of 100 is sorted before 20. To ensure numerical sorting works for you, all numbers must have leading zeros. For example, a call number of 020 is sorted before 100.

### Item Reservations Select By Options

**All Transactions**—All transactions are examined using the selection criteria for each report format.

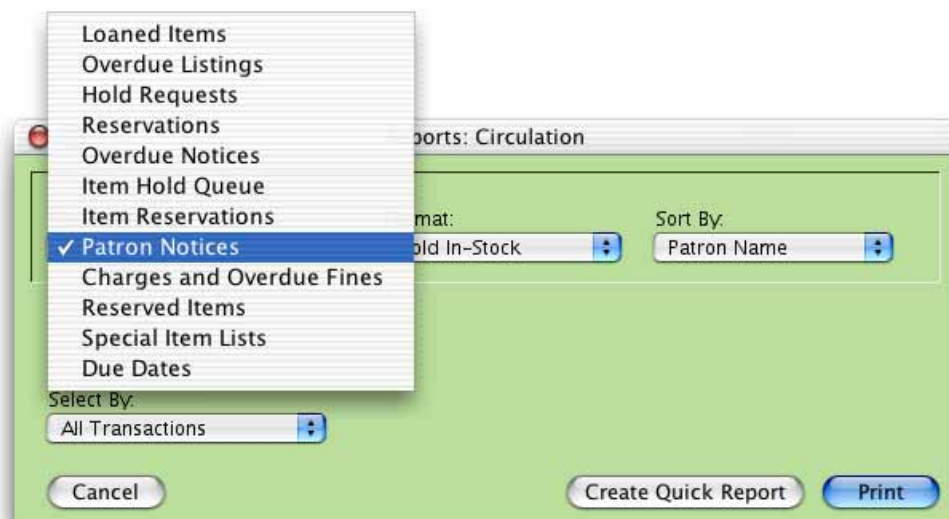
**Item Barcode**—This report includes items within the barcode range you specify.

**Item Title—Title**—This report includes item titles within the alphabetical range you specify.

- ✓ Loaned Items
- Overdue Listings
- Hold Requests
- Reservations
- Overdue Notices
- Item Hold Queue
- Item Reservations
- Patron Notices
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- Reserved Items
- Special Item Lists
- Due Dates

## Patron Notices

These include the following notices. You can change the text of these notices using the **Letters** preference on the **Circulation** tab of the **Local Circulation** preference window (see “Circulation Preferences” on page 109)



### Patron Notices Report Formats

**Hold In-Stock**—Notice sent to a patron to inform them that a book they have on hold is available in the library.

**Recall Letters**—Notice sent to a patron, asking that they return a book they have checked out.

### Patron Notices Sort By Options

See page 433 for complete and detailed descriptions of Patron Notices Sort By options.

### Patron Notices Select By Options

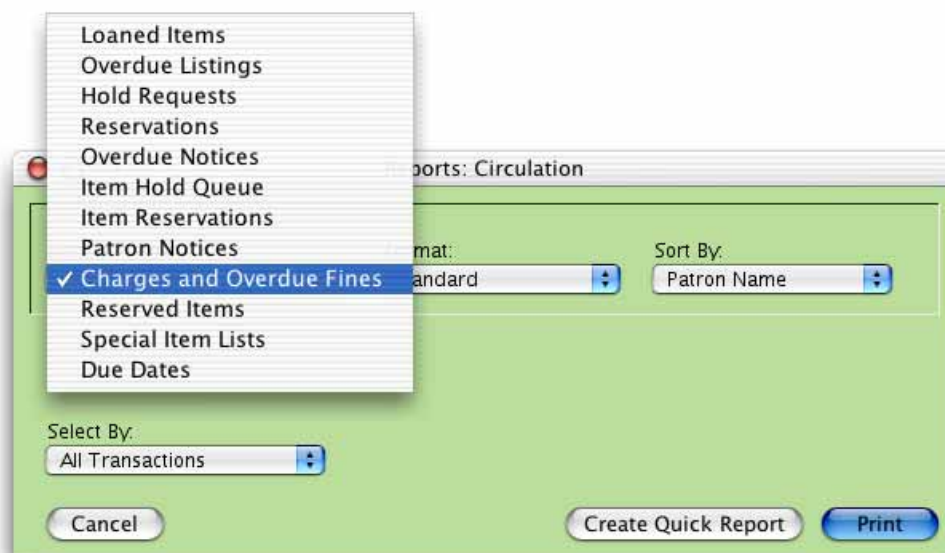
See page 434 for complete and detailed descriptions of Patron Notices Select By options.





## Charges and Overdue Fines

Reports which include both fines and overdue records with fines. Within specified ranges, only fines and other charges will be printed. Use these reports to see who owes the library money. Only Circulation records where an actual fine is due are included. Thus, an overdue item with no fine is not included.



## Charges and Overdue Fines Report Formats

**Standard**—Displays transactions for currently overdue items and unpaid fines/charges issued against a patron.

**Charges Only**—Only displays transactions where a charge is due (charges are fees that have reached their maximum limit and are no longer accruing). Does not include fines for currently overdue items.

**Fines Only**—Only displays transactions where a fine is due (fines are fees that are still accruing). Does not include other charges, such as charges for previously overdue items that have been returned.

## Charges and Overdue Fines Sort By Options

See page 433 for complete and detailed descriptions of Charges and Overdue Fines **Sort By** options.

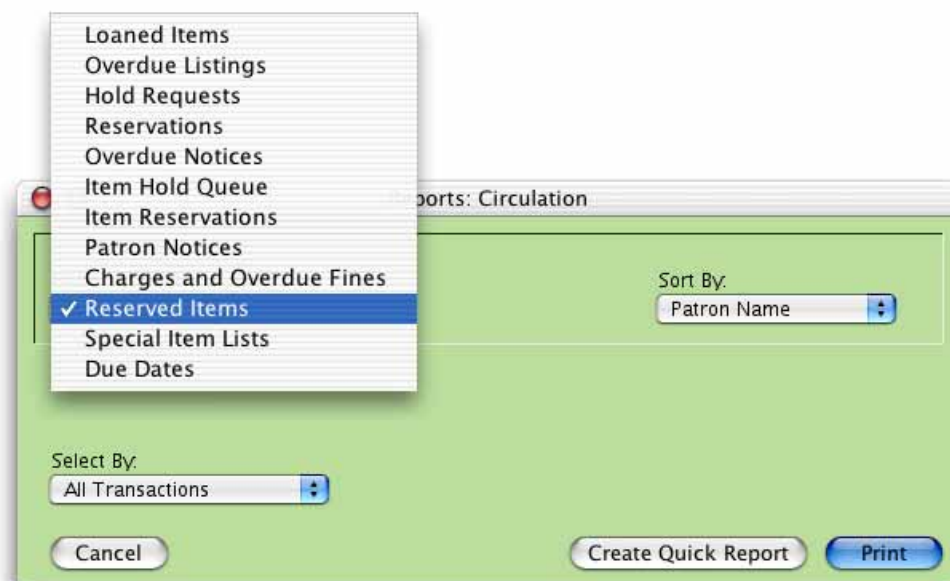
## Charges and Overdue Fines Select By Options

See page 434 for complete and detailed descriptions of Charges and Overdue Fines **Select By** options.

- ✓ Loaned Items
- Overdue Listings
- Hold Requests
- Reservations
- Overdue Notices
- Item Hold Queue
- Item Reservations
- Patron Notices
- Charges and Overdue Fines
- Reserved Items
- Special Item Lists
- Due Dates

## Reserved Items

Prints a list of reserved items. These are the items checked out using the “J” circulation command.



There are no Reserved Items Report Formats.

### Reserved Items Sort By Options

See page 433 for complete and detailed descriptions of Reserved Items **Sort By** options.

### Reserved Items Select By Options

See page 434 for complete and detailed descriptions of Reserved Items **Select By** options.

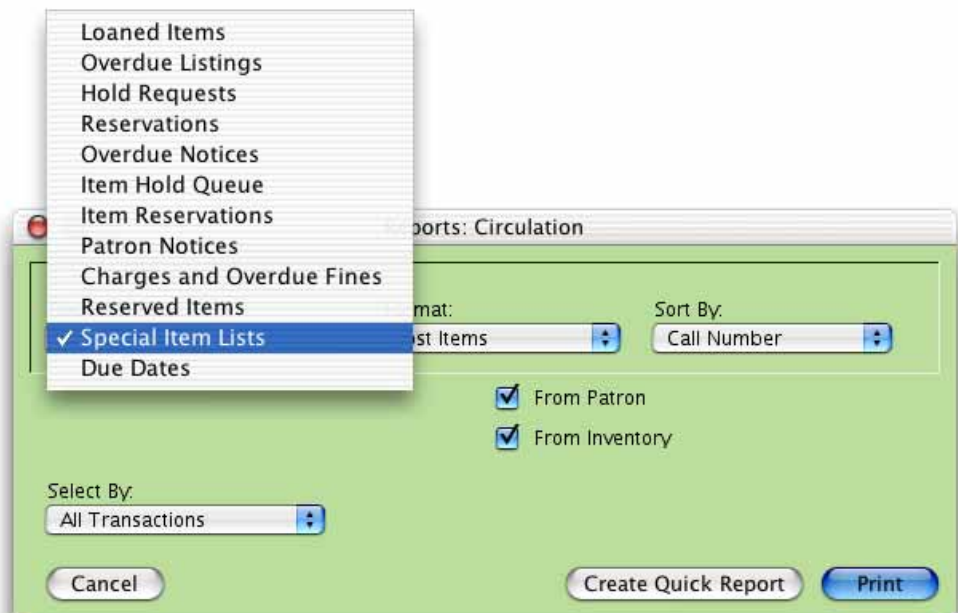
- ☒ Loaned Items
- ☐ Overdue Listings
- ☐ Hold Requests
- ☐ Reservations
- ☐ Overdue Notices
- ☐ Item Hold Queue
- ☐ Item Reservations
- ☐ Patron Notices
- ☐ Charges and Overdue Fines
- ☐ Reserved Items
- ☐ Special Item Lists
- ☐ Due Dates

## Special Item Lists

These reports are designed to show items with special status codes.

**From Patron**—This checkbox allows you to narrow your **Lost** and **Discarded** Special Item List. If you only want to view items marked as lost or discarded by patrons, check this box. If you want a complete Special Item List, leave both checked.

**From Inventory**—This checkbox allows you to narrow your **Lost** and **Discarded** Special Item List. If you only want to view items marked as lost or discarded from inventory, check this box. If you want a complete Special Item List, leave both checked.



## Special Item List Report Formats

**Lost Items**—All items that are considered Lost. This includes items checked out to Patron barcode #1.

**Discarded Items**—All items that are checked out to Patron barcode #2.

**Library Use Items**—All items that are checked out to Patron barcode #3.

**On Repair Items**—All items that are checked out to Patron barcode #4.

**On Order Items**—All items that are checked out to Patron barcode #5.

**Archived Items**—All items that are checked out to Patron barcode #6.

## Special Item List Sort By Options

**Call Number**—Sorts Special Item List by Call Number order.

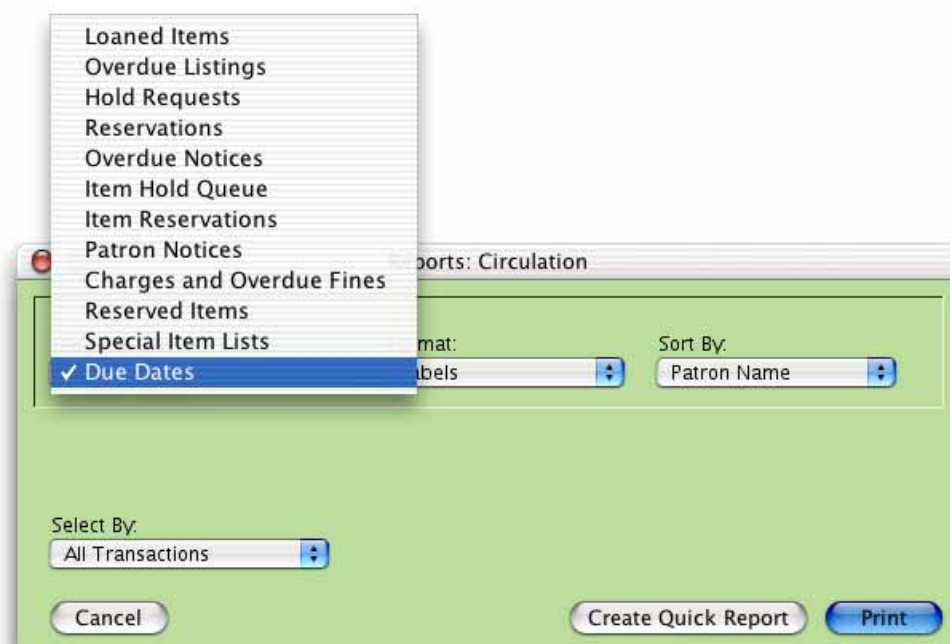
## Special Item List Select By Options

See page 434 for complete and detailed descriptions of Special Item List **Select By** options.

- ✓ Loaned Items
- Overdue Listings
- Hold Requests
- Reservations
- Overdue Notices
- Item Hold Queue
- Item Reservations
- Patron Notices
- Charges and Overdue Fines
- Reserved Items
- Special Item Lists
- Due Dates

## Due Dates

Use this report to print due date stickers or slips for patrons who borrow from your library.



### Due Dates Report Formats

**Labels**—Prepares the report in a “label” format for easy adhesive.

**Slips**—Prepares and prints the due dates in a “slip” report format.

### Due Dates Sort By Options

See page 433 for complete and detailed descriptions of Due Dates **Sort By** options.

### Due Dates Select By Options

See page 434 for complete and detailed descriptions of Due Dates **Select By** options.

✓ Patron Name
Patron Homeroom
Patron 2nd Location
Call Number
Due Date

## Circulation Report Sort By Options

Use the **Sort By** drop-down menu to select the order that you want the items listed in your report.

The following is a list of **Sort By** values for circulation reports.

**Patron Name**—Report sorted alphabetically by the patron's name.

**Patron School**—Report sorted alphabetically by the patron's school.

**Patron Homeroom**<sup>1</sup>—This report is sorted alphabetically by Location, and within each location by patron name. Each location begins on a separate page. This makes it easy to distribute reports to different locations.

**Patron 2nd Location**<sup>2</sup>—This report is sorted alphabetically by 2nd Location, and within each location by patron name. Each 2nd Location begins on a separate page. This makes it easy to distribute reports to different 2nd Locations.

**Call Number**—Report sorted in Call Number order. This sorting order makes it easy to use the report to search the library for returned items that haven't been recorded as returned by Alexandria.

**Due Date**—This report is sorted by due date and then by patron name. This sorting order makes it easy to find transactions in due-date order.

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1. The name for Location is customized in Preferences. Your customized name will appear.

2. The name for 2nd Location is customized in Preferences. Your customized name will appear.

✓ All Transactions
Archived on Date
Days Overdue
Discarded on Date
Due Date
In-Stock Expire
Item Barcode
Item Policy
Lost on Date
Patron 2nd Location
Patron Barcode
Patron Grade
Patron Homeroom
Patron Name
Patron Policy
Patron School
Request Expire
Reservation Begin Date
Temporary Items
Transaction Date

## Circulation Report Select By Options

Use the selection drop-down menu to specify which transactions should be examined for inclusion in the report. Each circulation report has its own selection filter, but, by specifying additional selection options, you can further restrict the number of records examined and displayed for your report.

For example, the Loaned Items report only includes loaned items, but you can further restrict the report to only include loaned items from a specific location using the selection drop-down menus.

You can enter up to six values for selection criteria using **AND**, **OR**, and **AND NOT** (Boolean logic). When you choose values in the selection drop-down menus, other fields appear, asking you for **Starting With** and **Ending With** values.

**All Transactions**—All transactions are examined using the selection criteria for each report format.

**Archived on Date**—This report only includes items archived during a date range you specify. If you enter only a **Starting With** date, Alexandria will assume a **Ending With** date in the “far future.” If you enter only an **Ending With** value the **Starting With** value will be assumed to be in the very “far past.”

**Days Overdue**—This report includes transactions with due dates computed between the **Starting With** and **Ending With** ranges of days overdue. If you enter only a **Starting With** selection, Alexandria will assume a “very large” ending value. If you enter only an **Ending With** value, the **Starting With** value is assumed to be zero. For example, to select items that are at least seven days overdue, enter “7” in the **Starting With** field. To find items that are seven or fewer days overdue enter an **Ending With** value of “7”. To locate items that are due in the next seven days, enter a **Starting With** value of “-7” and an **Ending With** value of “0”. The results of this selection are exactly the same as if you put dates into the **Due Date** selection criteria.

**Discarded on Date**—This report only includes items discarded during a date range our specify. If you enter only a **Starting With** date, Alexandria will assume an **Ending With** date in the “far future.” If you enter only an **Ending With** value, the **Starting With** value will be assumed to be in the very “far past.”

**Transaction Date**—This report includes transactions performed during a transaction date range you specify. The transaction date is the date on which the transaction was performed. If you enter only a **Starting With** date, Alexandria will assume an **Ending With** date is the “far future.” If you enter only an **Ending With** value, the **Starting With** value is assumed to be in the very “far past.”

**Due Date**—This report includes transactions that have a due date within a date range you specify. A due date has different meanings depending on the type of transaction involved. For an item checked out, the due date is the date an item is due back to the library. For a hold request, the due date is the date on which the request expires. For a reservation, the due date is the date a reservation begins. If you enter **only** a **Starting With** date, Alexandria will assume an **Ending With** date in the “far future.” If you enter only an **Ending With** value the **Starting With** value is assumed to be in the “far past.”

**In-Stock Expiration Date**—This report only includes in-stock holds that expire in the date range you specify. If you enter only a **Starting With** date, Alexandria will assume an **Ending With** date in the “far future.” If you enter only an **Ending With** value the **Starting With** value will be assumed to be in the very “far past.”



✓ All Transactions
Archived on Date
Days Overdue
Discarded on Date
Due Date
In-Stock Expire
Item Barcode
Item Policy
Lost on Date
Patron 2nd Location
Patron Barcode
Patron Grade
Patron Homeroom
Patron Name
Patron Policy
Patron School
Request Expire
Reservation Begin Date
Temporary Items
Transaction Date

**Item Barcode**—This report includes transactions for a specified range of item barcodes.

**Item Policy**—This report includes transactions for a specified range of patron policies. If you enter only a **Starting With** (or **Ending With**) selection, Alexandria will select all records where the policy name matches the entered text.

**Lost on Date**—This report only includes items lost during a date range you specify. If you enter only a **Starting With** date, Alexandria will assume an **Ending With** date in the “far future.” If you enter only an **Ending With** value the **Starting With** value will be assumed to be in the very “far past.”

**Patron 2nd Location**<sup>1</sup>—This report only includes transactions for patrons in the 2nd locations you specify. If you enter only a **Starting With** (or **Ending With**) selection, Alexandria will select all records where the 2nd location begins with the entered text.

**Patron Barcode**—This report includes transactions for a specified range of patron barcodes. If you enter only a **Starting With** (or **Ending With**) selection, Alexandria will select all records where the barcode matches the entered text.

**Patron Grade**—This report only includes items with patron levels within the range you specify. If you enter only a **Starting With** (or **Ending With**) selection, Alexandria will select all records where the level begins with the entered text.

**Patron Homeroom**—This report only includes transactions for patrons in the locations you specify. Typically, this is used for preparing overdue listings for a group of patrons in a specified homeroom. If you enter only a **Starting With** (or **Ending With**) selection, Alexandria will select all records where the homeroom matches with the entered text.

**Patron Name**—This report includes transactions for a specified range of patron names. If you enter only a **Starting With** (or **Ending With**) selection, Alexandria will select all records where the name matches the entered text.

**Patron Policy**—This report includes transactions for a specified **From** and **Through** range of patron policies.

**Patron School**—This report only includes schools for patrons in the locations you specify. If you enter only a **Starting With** (or **Ending With**) selection, Alexandria will select all records where the school matches with the entered text.

**Request Expiration Date**—This report only includes hold requests that expire during a date range you specify. If you enter only a **Starting With date**, Alexandria will assume an **Ending With** date in the “far future.” If you enter only an **Ending With** value the **Starting With** value will be assumed to be in the very “far past.”

**Reservation Begin Date**—This report only includes reservations that start during a date range you specify. If you enter only a **Starting With date**, Alexandria will assume an **Ending With** date in the “far future.” If you enter only an **Ending With** value, the **Starting With** value is assumed to be in the very “far past.”

**Shelving**—This report only includes shelving locations for items.

**Temporary Items**—This report only includes transactions for temporary items. Because reservations and hold requests cannot be performed on temporary items, this option should not be used for those reports.

1. The term used for 2nd Location is customized in Preferences. Your custom term will appear here.



**Transaction Date**—This report includes transactions performed during a transaction date range you specify. The transaction date is the date on which the transaction was performed. If you enter only a **Starting With** date, Alexandria will assume an **Ending Date** is the “far future.” If you enter only an **Ending With** value, the **Starting With** value is assumed to be in the very “far past.”

# Usage Statistics

## Preparing Usage Statistics Reports

**Usage Statistics** give you insight on how your library is being used, return rates, usage by item, and patron policies. Time and group-based statistical reports can be created.

Of course, no single institution will use *all* these reports, so experiment with your choices to determine which reports are applicable to your institution.

Statistics are collected on an hourly basis for each patron/item transaction that occurs. Therefore, there may be thousands of statistical records saved for your institution. For example, when a patron of type STU borrows an item of type FIC during the 10th hour of June 1, 2002, a statistics record is created. If more STU patrons borrow more FIC items during this hour, the statistic counts are updated. Also, if a FAC patron borrows an item, additional statistical records are created for this policy. Therefore, not only are statistic records time-based, but they can provide information on which patron groups are using which types of items and which item groups are getting used most.

Many statistics reports are available. After using Alexandria for a few months, you might gain some interesting insights into the operation of your library by examining these reports.

To prepare usage statistics reports follow these steps.

- Step 1. Choose **Usage Statistics** from the **Reports** menu.
- Step 2. Choose the type of report you want from the **Report Name** drop-down menu.
- Step 3. Choose how you want your report **Format** displayed.
- Step 4. Choose the **Sort By** order.
- Step 5. Use the **Select By** drop-down menu to select which records to include in this report.
- Step 6. Click the **Print** button to prepare the report.

### Reports

Special Reports

Patron Reports

Item Reports

Circulation Reports

Usage Statistics

Order Reports

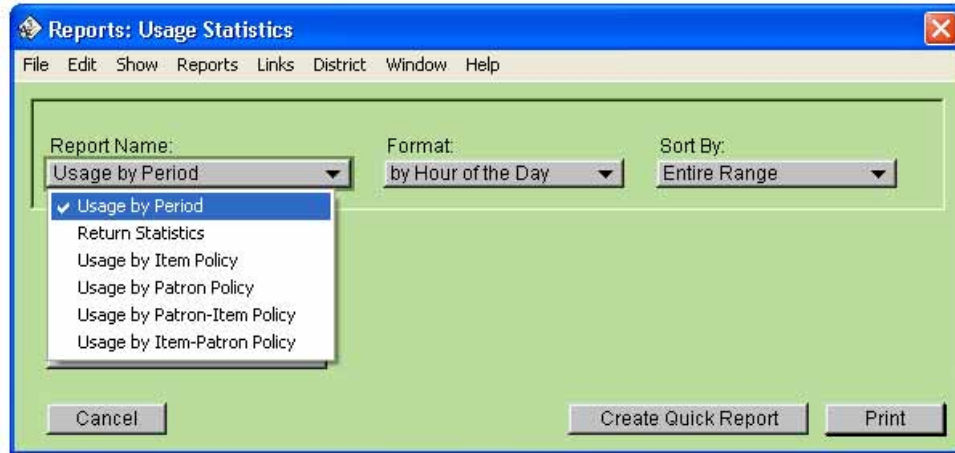
Subscription Reports

Quick Reports

- ✓ Usage by Period
- Return Statistics
- Usage by Item Policy
- Usage by Patron Policy
- Usage by Patron-Item Policy
- Usage by Item-Patron Policy

## Usage by Period

Allows the user to examine item usage over different time periods. Use these reports to answer questions, such as: “Which months have the most activity?” or “Are some days of the month busier than others?”



## Usage by Period Report Formats

**by Hour of the Day**—Provides statistics on transactions during certain hours of the day. Use this report to determine what hours of the day are the busiest for your library.

**by Day of the Week**—Provides statistics on transactions during specific days of the week. Use this report to determine which days of the week are the busiest for your library.

**by Day of the Month**—Provides statistics on transactions during specific days of the month. Use this report to determine which days of the month are the busiest for your library.

**by Month of the Year**—Provides statistics on transactions during specific months of the year. Use this report to determine which months of the year are the busiest for your library.

**by Hour by Day**—Prints a grid with hours down the left side and days of the week across the top, displaying usage in every cell. Use this report to determine which hours of the day are busiest on which days of the week.

## Usage by Period Sort By Options

See page 444 for complete and detailed descriptions of Usage by Period **Sort By** options.

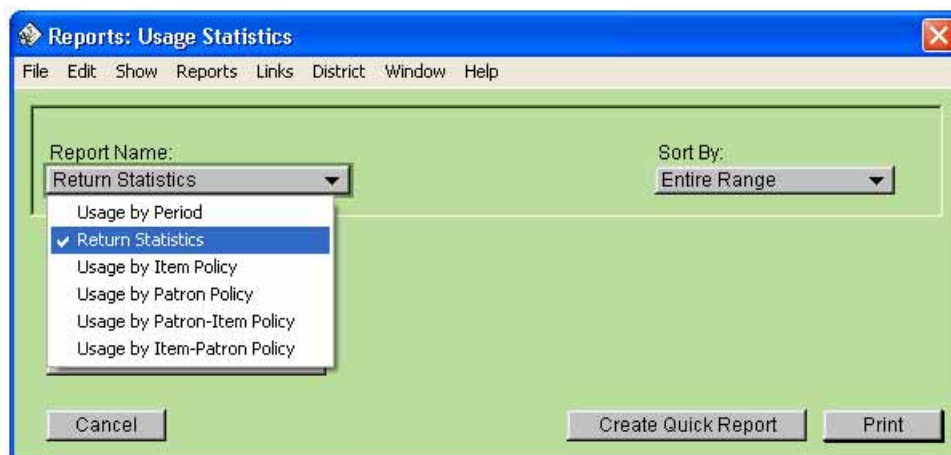
## Usage by Period Select By Options

See page 444 for complete and detailed descriptions of Usage by Period **Select By** options.

- ✓ Usage by Period
- Return Statistics
- Usage by Item Policy
- Usage by Patron Policy
- Usage by Patron-Item Policy
- Usage by Item-Patron Policy

## Return Statistics

Prints a summary report on how close to the due date items are returned. A negative number indicates that items are returned before the due date, a positive number indicates that items are returned after the due date. This information can be used to help determine if your library's loan period matches the actual return rate of your patrons.



### Return Statistics Sort By Options

See page 444 for complete and detailed descriptions of Return Statistics **Sort By** options.

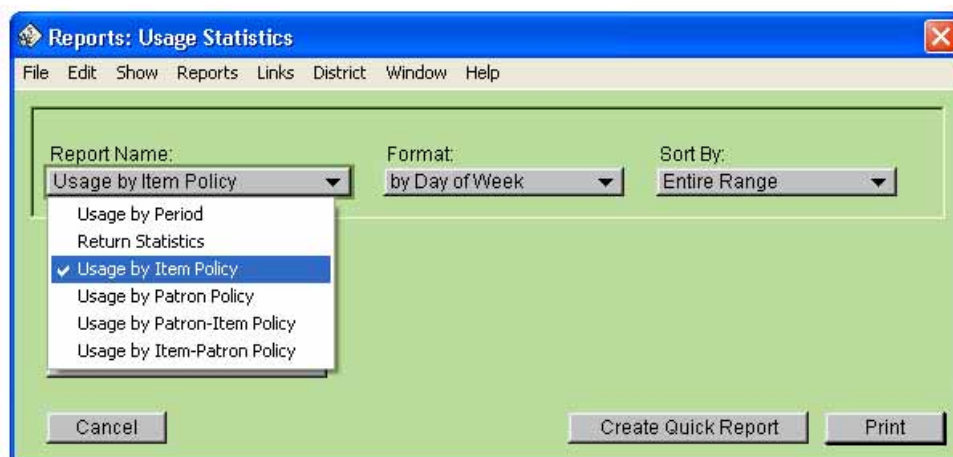
### Return Statistics Select By Options

See page 444 for complete and detailed descriptions of Return Statistics **Select By** options.

- ✓ Usage by Period
- Return Statistics
- Usage by Item Policy
- Usage by Patron Policy
- Usage by Patron-Item Policy
- Usage by Item-Patron Policy

## Usage by Item Policy

Allows the user to see if items with a specific policy are used during different periods.



## Usage by Item Policy Report Formats

**by Day of Week**—Prints a grid with item policies down the left side and days of the week across the top. Item usage is printed in each cell. Use this report to determine which item groups are being used on which days of the week. This information can be used for budgeting, staffing and other uses.

**by Month**—Prints a grid with item policies down the left side and months of the year across the top. Item usage is printed in each cell. Use this report to determine which item groups are being used during which months of the year. This information can be used for budgeting, staffing and other uses.

**by Patron Policy**—For each item policy, patron policies are listed along with the types of activities performed. Use this report to determine what items patrons are using.

## Usage by Item Policy Sort By Options

See page 444 for complete and detailed descriptions of Usage by Item Policy **Sort By** options.

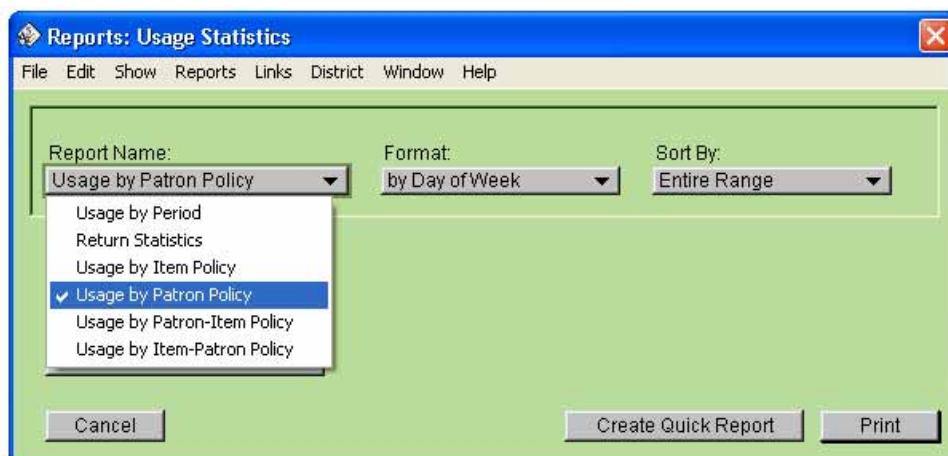
## Usage by Item Policy Select By Options

See page 444 for complete and detailed descriptions of Usage by Item Policy **Select By** options.

- ✓ Usage by Period
- Return Statistics
- Usage by Item Policy
- Usage by Patron Policy
- Usage by Patron-Item Policy
- Usage by Item-Patron Policy

## Usage by Patron Policy

Allows the user to see which types of patrons are using the library during different periods.



## Usage by Patron Policy Report Formats

**by Day of Week**—Prints a grid with patron policies down the left side and days of the week across the top. Item usage is printed in each cell. Use this report to determine which patron groups are checking out items on which days of the week. This information can be used for budgeting, staffing and other uses.

**by Month**—Prints a grid with patron policies down the left side and months of the year across the top. Item usage is printed in each cell. Use this report to determine which patron groups are being issued items during which months of the year. This information can be used for budgeting, staffing and other uses.

**by Item Policy**—Use this report to determine what library items patrons are checking out.

## Usage by Patron Policy Sort By Options

See page 444 for complete and detailed descriptions of Usage by Patron Policy **Sort By** options.

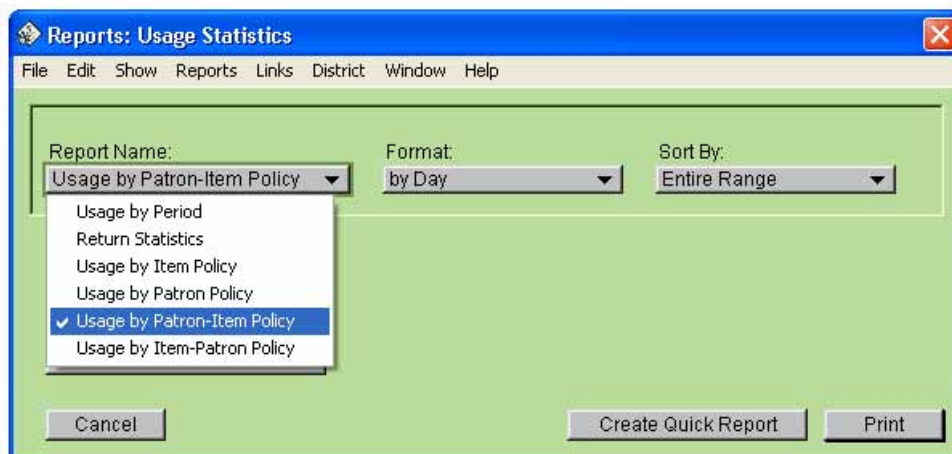
## Usage by Patron Policy Select By Options

See page 444 for complete and detailed descriptions of Usage by Patron Policy **Select By** options.

- ✓ Usage by Period
- Return Statistics
- Usage by Item Policy
- Usage by Patron Policy
- Usage by Patron-Item Policy
- Usage by Item-Patron Policy

## Usage by Patron-Item Policy

Allows the user to examine combinations of patron and item policies.



## Usage by Patron-Item Policy Report Formats

**by Day**—Prints a grid with patron/item policy pairs down the left side and days of the week across the top. Item usage is printed in each cell. Use this report to determine which circulation groups are checking out items on which days of the week.

**by Month**—Prints a grid with patron/item policies down the left side and months of the year across the top. Item usage is printed in each cell. Use this report to determine which patron groups are checking out what item types during which months of the year.

## Usage by Patron-Item Policy Sort By Options

See page 444 for complete and detailed descriptions of for complete and detailed descriptions of Usage by Patron-Item Policy **Sort By** options.

## Usage by Patron-Item Policy Select By Options

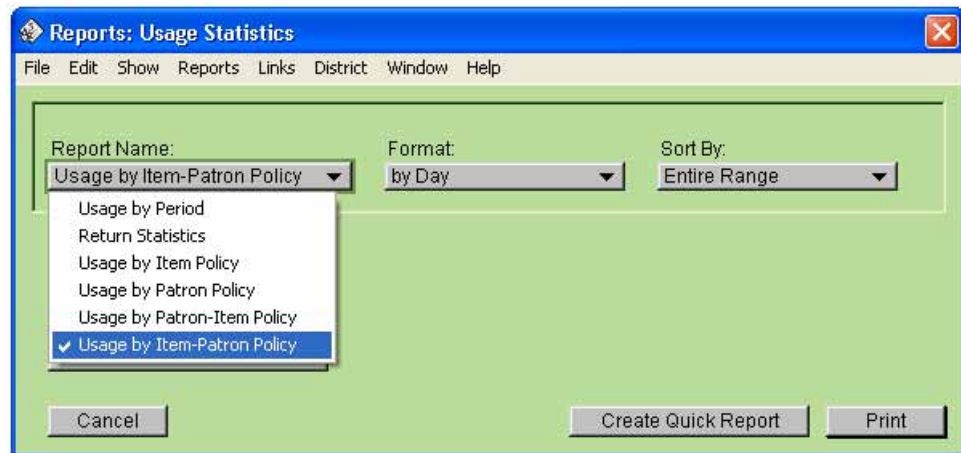
See page 444 for complete and detailed descriptions of for complete and detailed descriptions of Usage by Patron-Item Policy **Select By** options.



- ✓ Usage by Period
- Return Statistics
- Usage by Item Policy
- Usage by Patron Policy
- Usage by Patron-Item Policy
- Usage by Item-Patron Policy

## Usage by Item-Patron Policy

Allows the user to examine combinations of item and patron policies.



### Usage by Item-Patron Policy Report Formats

**by Day**—Prints a grid with item/patron policies down the left side and days of the week across the top. Item usage is printed in each cell. Use this report to determine which items are being checked out by which patron groups on which days of the week.

**by Month**—Prints a grid with item/patron policies down the left side and months of the year across the top. Item usage is printed in each cell. Use this report to determine which item groups are being checked out and by whom during which months of the year.

### Usage by Item-Patron Policy Sort By Options

See page 444 for complete and detailed descriptions of Usage by Item-Patron Policy **Sort By** options.

### Usage by Item-Patron Policy Select By Options

See page 444 for complete and detailed descriptions of Usage by Item-Patron Policy **Select By** options.

☒ Entire Range

☐ Month

Usage Statistics Sort By Options

If you want further monthly subtotals (providing the date range spans more than one month), select a the **Sort By** option **By Month**, or else select the **Entire Range** option.

**Entire Range**—Reports using the entire range of Alexandria usage statistics data.

**Month**—Reports using specified months of Alexandria usage statistics data.

☒ All Statistics

☐ Date Range

Usage Statistics Select By Options

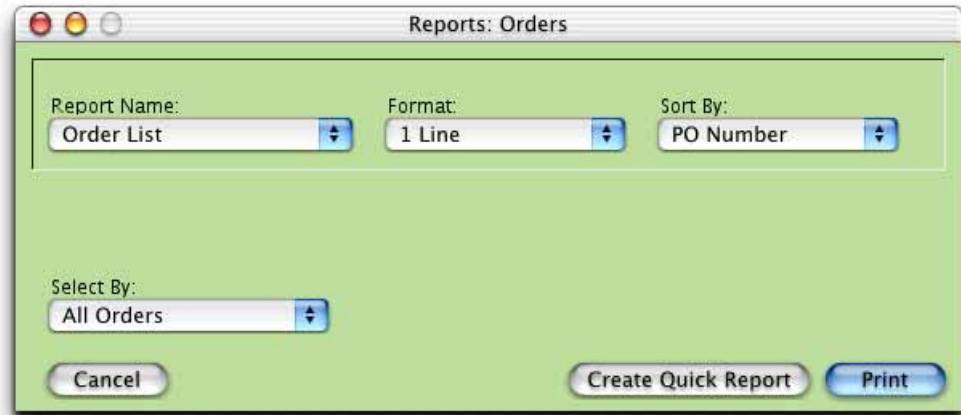
**All Statistics**—You can instruct Alexandria to prepare reports using **All Statistics** or only statistics over a specified **Date Range** (see below).

**Date Range**—Enter a **Starting** and **Ending Date** range. If you enter **ONLY** a **Starting Date**, the ending date is assumed to be in the “far future.” If you enter **ONLY** an **Ending Date**, the **Starting Date** is assumed to be in the “far past.” If you don’t enter any date, the **Starting Date** is set for one year in the past. For example, you can enter the date December 1, 2003 as: “Dec 1 , 2003” or “12/01/03”<sup>1</sup> or “12.1.03” or “12 1 03”. If the year is 2003, you can just enter “12/1”. If the current month is December, you can just enter “1”.

1. When you enter a two digit date, values between 0-30 are assumed to be 2000-2030 and values between 31-99 are assumed to be 1931-1999.

# Order Reports

Order reports contain report options for orders, vendors, and budgets.



## Reports

- Special Reports
- Patron Reports
- Item Reports
- Circulation Reports
- Usage Statistics
- Order Reports
- Subscription Reports
- Quick Reports

## Preparing Order, Vendor & Budget Reports

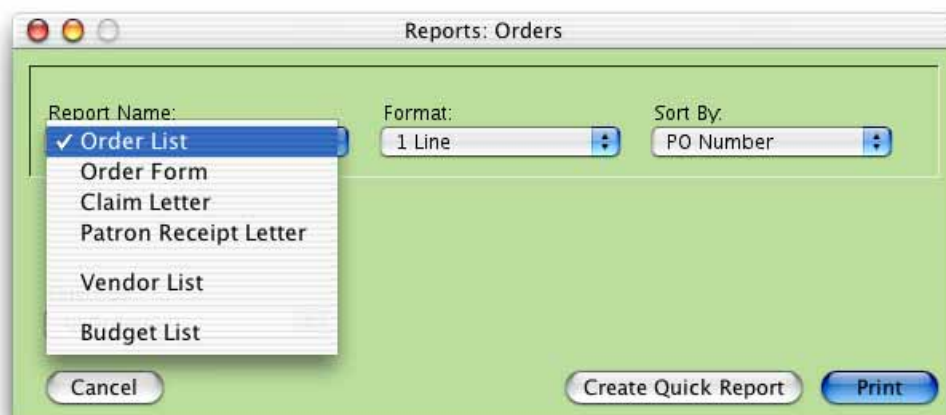
Order reports give you immediate access to information about the orders processed in your library. To prepare order reports, follow these steps:

- Step 1. Choose **Order Reports** from the **Reports** menu.
- Step 2. Choose the type of report you want from the **Report Name** drop-down menu.
- Step 3. Choose how you want to have your report displayed, under the **Format** drop-down menu.
- Step 4. Choose the **Sort By** order for this report
- Step 5. Use the **Select By** drop-down menu to select which order records to include in this report.
- Step 6. Click on the **Print** button to prepare the report.
- Step 7. Make any desired changes using the **Virtual Word Processor** tools.
- Step 8. To send to the printer, either click on the **Printer** icon or choose **Print** under the **File** menu.

- ✓ Order List
- Order Form
- Claim Letter
- Patron Receipt Letter
- Vendor List
- Budget List

## Order List

Order reports provide order information in various formats along with printing claim letters and other management reports.



### Order List Report Formats

**1 line**—Prints a one-line summary for each order that includes the PO number, order number, date ordered, date received, current status, number of line items, and the total amount of the order.

**Complete**—Prints all information for the selected orders, including all line item details.

### Order List Sort By Options

See page 452 for complete and detailed descriptions of Order List **Sort By** options.

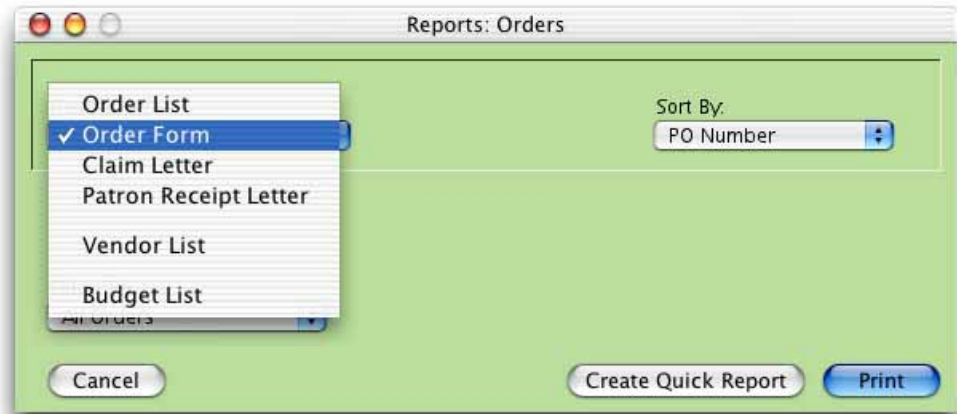
### Order List Select By Options

See page 453 for complete and detailed descriptions of Order List **Select By** options.

- ✓ Order List
- Order Form
- Claim Letter
- Patron Receipt Letter
- Vendor List
- Budget List

## Order Form

Prints a complete order form for each order. Only **Open** and **Issued** orders are used for the report, unless you've specified an order status selection. If an order is **Open**, its status is updated to **Issued**. **Closed** orders are generally not printed unless specifically selected.



There are no **Formats** available for **Order Forms**.

### Order Form Sort By Options

**PO Number**—Orders are sorted by PO number.

**Vendor Name**—Orders are sorted by vendor name and then by order issue date. Subtotals are printed for each new vendor.

### Order Form Select By Options

See page 452 for complete and detailed descriptions of Order Form **Select By** options.

- ✓ Order List
- Order Form
- Claim Letter
- Patron Receipt Letter

Vendor List

Budget List

## Claim Letter

Prints claim letters for unreceived items on all the selected orders. Only **Issued** orders are used for the report unless you've specified an order status selection.



There are no **Formats** available for **Claim Letter**.

### Claim Letter Sort By Options

See page 452 for complete and detailed descriptions of Claim Letters **Sort By** options.

### Claim Letter Select By Options

See page 452 for complete and detailed descriptions of Claim Letter **Select By** options.

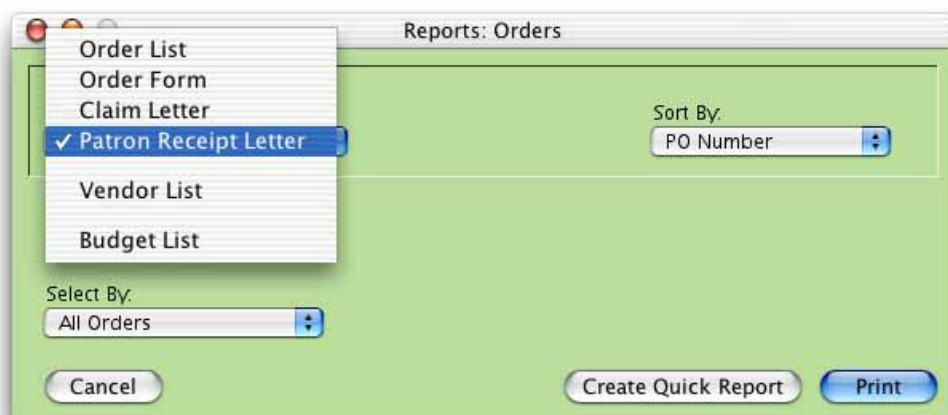
- ✓ Order List
- Order Form
- Claim Letter
- Patron Receipt Letter

- Vendor List

- Budget List

## Patron Receipt Letter

This report will print customizable receipt letters for patrons who have requested an on-order item (*see page 344 for more information on requesting patrons*).



There are no **Formats** available for **Patron Receipt Letter**.

## Claim Letter Sort By Options

See page 452 for complete and detailed descriptions of Claim Letters **Sort By** options.

## Claim Letter Select By Options

See page 452 for complete and detailed descriptions of Claim Letter **Select By** options.



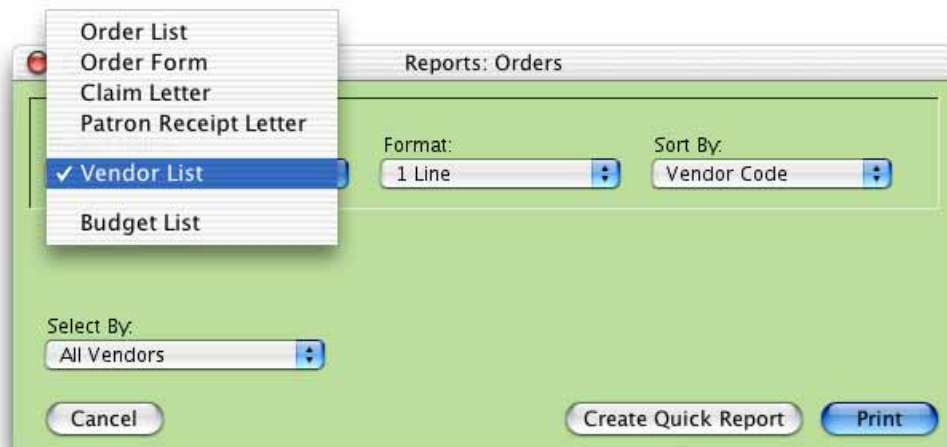
✓ Order List  
Order Form  
Claim Letter  
Patron Receipt Letter

Vendor List

Budget List

## Vendor List

Vendor reports provide vendor information in various formats.



### Vendor List Report Formats

**1 line**—Vendor information is printed on a brief one-line per vendor format. the company name, vendor code, contact, telephone, and status are printed for each vendor.

**Complete**—All vendor information is displayed on the report.

### Vendor List Sort By Options

See page 453 for complete and detailed descriptions of Vendor List **Sort By** options.

### Vendor List Select By Options

See page 453 for complete and detailed descriptions of Vendor List **Select By** options.

- ✓ Order List
- Order Form
- Claim Letter
- Patron Receipt Letter
- Vendor List
- Budget List

## Budget List

Budget reports list budget information in various formats.

The screenshot shows a window titled "Reports: Orders" with a green background. A dropdown menu is open, listing the following options: Order List, Order Form, Claim Letter, Patron Receipt Letter, Vendor List, and Budget List (which is highlighted with a blue bar and a checkmark). Below the menu, there are two dropdown menus: "Format:" set to "1 Line" and "Sort By:" set to "Budget Code". At the bottom left, there is a "Select By:" dropdown menu set to "All Budgets". At the bottom right, there are three buttons: "Cancel", "Create Quick Report", and "Print".

### Budget List Report Formats

**1 line**—Budget information is printed on a brief one-line per budget format. The budget code, description, status, and amount committed and spent amounts are printed.

**Complete**—All budget information is displayed on the report.

### Budget List Sort By Options

See page 454 for complete and detailed descriptions of Budget List **Sort By** options.

### Budget List Select By Options

See page 454 for complete and detailed descriptions of Budget List **Select By** options.

☒ PO Number

☐ Vendor Name

☐ Budget Code

☐ Issue Date

Order Reports Sort By Options

- PO Number**—Orders are sorted by PO number.
- Vendor Name**—Orders are sorted by vendor name and then by order issue date. Subtotals are printed for each new vendor.
- Budget Code**—Orders are sorted by budget code and then by order issue date. Subtotals are printed for each budget code.
- Issue Date**—Orders are sorted by order issue date.

☒ All Orders

☐ Order Issue Date

☐ Order Status

☐ PO Number

☐ Sequence #

☐ Vendor Code

Order Reports Select By Options

- All Orders**—All orders are examined for the report.
- Order Issue Date**—Only orders within the specified order-issue date-range are included in the report.
- Order Status**—Only orders with a specified status chosen below are included.
- 1 - **Open Orders**

Only selects orders that have the **Open** status.
- 2 - **Issued Orders**

Only selects orders that orders that have **Issued** as the status.
- 3 - **Closed Orders**

Only selects completed **Closed** status orders.
- PO Number**—Only orders within specified PO numbers are included in the report.
- Sequence #**—Only orders within specified sequence numbers are included in this report.
- Vendor Code**—Only orders with a specified vendor code are included in the report.

<input checked="" type="checkbox"/> Vendor Code	<input type="text"/>
<input type="checkbox"/> Vendor Company Name	<input type="text"/>

## Vendor Reports Sort By Options

**Vendor Code**—The report is sorted by vendor code.

**Vendor Company Name**—The report is sorted by vendor company name.

<input checked="" type="checkbox"/> All Vendors	<input type="text"/>
<input type="checkbox"/> Active Vendors	<input type="text"/>
<input type="checkbox"/> Inactive Vendors	<input type="text"/>
<input type="checkbox"/> Vendor Code	<input type="text"/>
<input type="checkbox"/> Vendor Company Name	<input type="text"/>

## Vendor Reports Select By Options

**All Vendors**—All vendors are included on the report.

**Active Vendors**—Selects vendor records which are **Active**.

**Inactive Vendors**—Selects vendor records which are **Inactive**.

**Vendor Code**—Only vendor codes within the specified range are included.

**Vendor Company Name**—Only vendor company names within the specified range are included.

✓ Budget Code
Budget Name

Budget Reports Sort By Options

**Budget Code**—The report is sorted by budget code.

**Budget Name**—The report is sorted by budget name.

✓ All Budgets
Active Budgets
Budget Code
Budget Name
Inactive Budgets

Budget Reports Select By Options

**All Budgets**—All budgets are included on the report.

**Active Budgets**—Selects budget records which are **Active**.

**Budget Code**—Only budgets with codes in the specified range are included.

**Budget Name**—Only budgets with names in the specified range are included.

**Inactive Budgets**—Selects budget records which are **Inactive**.

# Subscription Reports

These reports print information from the Subscription and Routing management windows. **Subscription Reports** provide reference lists of subscription and renewal lists. Reports include summary statistics that provide additional information for budgeting within the library. **Route Reports** provides lists of routes in summary or detailed formats.

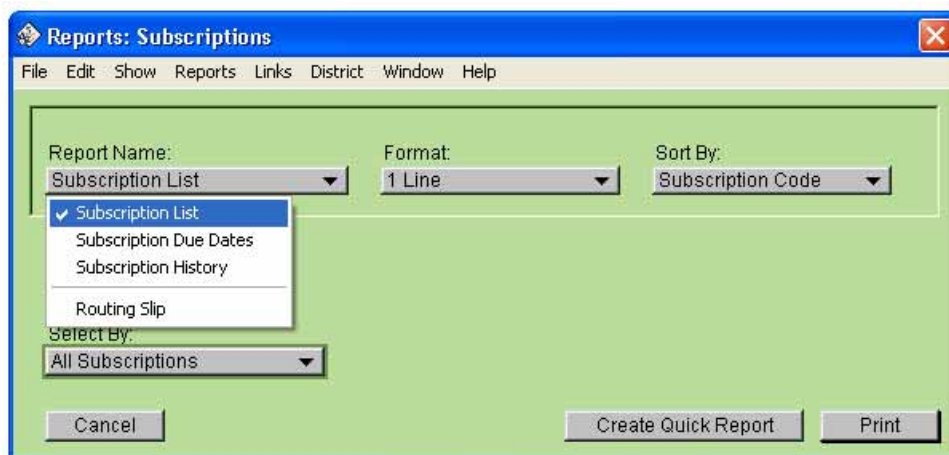
## Preparing Subscription & Route Reports

Subscription reports give you immediate access to information about the subscriptions used in your library. To prepare a subscription report, follow these steps.

- Step 1. Choose **Subscription Reports** from the **Reports** menu.
- Step 2. Choose the type of report you want from the **Report Name** drop-down menu.
- Step 3. Choose how you want your report **Format** displayed.
- Step 4. Choose the **Sort By** order for this report.
- Step 5. Use the **Select By** drop-down menu to select which subscription records to include in this report.
- Step 6. Click on the **Print** button to prepare the report.
- Step 7. Make any desired changes using the **Virtual Word Processor** tools.
- Step 8. To send to the printer, either click on the icon of the printer or choose **Print** under the **File** menu.

## Subscription List

This report prints lists and descriptions of all subscriptions received within your library.



### Subscription List Report Formats

**1 line**—A brief one-subscription-per-line report is printed. The Subscription name, title and frequency are shown.

**Complete**—All subscription information is included on this report.

**Renewal List**—A brief one-subscription-per-line report is printed, including the subscription name, title, renewal date, and cost. A total cost is printed at the bottom of the report. Use this report to review subscriptions that are due for renewal, or estimate the budgets required for subscriptions.

### Subscription List Sort By Options

See page 460 for complete and detailed descriptions of Subscription List **Sort By** options.

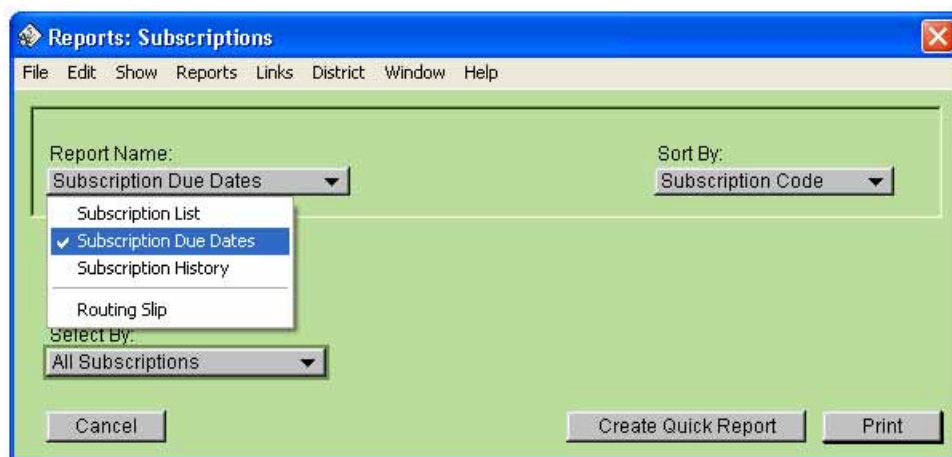
### Subscription List Select By Options

See page 460 for complete and detailed descriptions of Subscription List **Select By** options.



## Subscription Due Dates

Track when subscriptions are to be received by your library or are past due.



There are no Subscription Due Date **Formats** available.

### Subscription Due Date Sort By Options

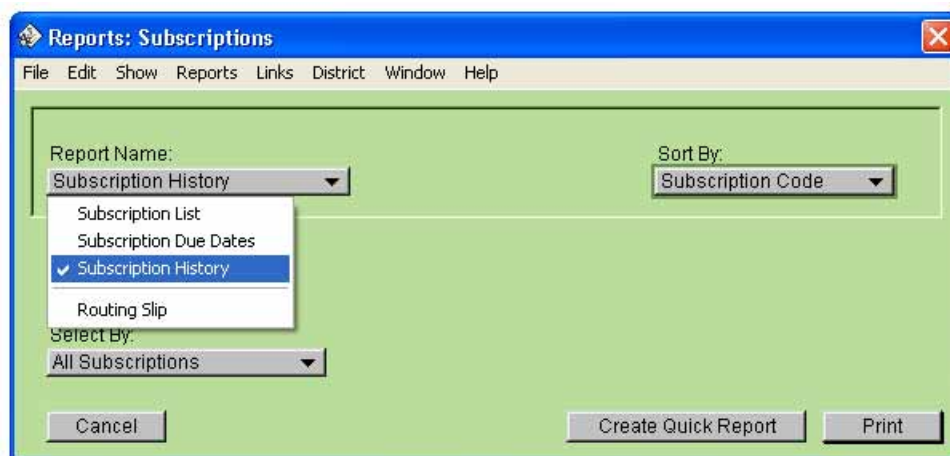
See page 460 for complete and detailed descriptions of Subscription Due Date **Sort By** options.

### Subscription Due Date Select By Options

See page 460 for complete and detailed descriptions of Subscription Due Date **Select By** options.

## Subscription History

Lists the date when each issue was received and the number of issues remaining. There is a page break between each subscription.



There are no Subscription History report **Formats** available.

## Subscription History Sort By Options

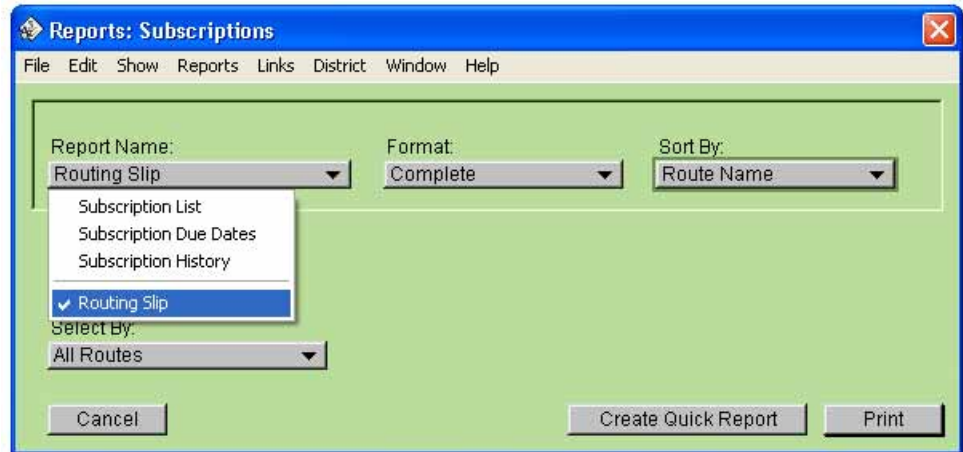
See page 460 for complete and detailed descriptions of Subscription History **Sort By** options.

## Subscription History Select By Options

See page 460 for complete and detailed descriptions of Subscription History **Select By** options.

## Routing Slip

Prints routing slips for all selected routes. Generally, Alexandria will either print the routing slips automatically when items are received, or you'll print them individually from the **Routing Management** or **Circulation** window. However, if you'd like to print several at once, this report is available.



## Routing Slip Report Formats

**1 line**—A brief one-line-per-route report is printed.

**Complete**—All routing information is included on this report.

## Route Reports Sort By Options

**Route Name**—The report will be sorted by the route name.

**Responsible Patron Name**—The report will be sorted by the responsible patrons name.

## Route Reports Select By Options

**All Routes**—Include all routes in the report.

**Route Name**—All routes within a specified range are included in the report.

**Responsible Patron Barcode**—All routes within a specified range are included in the report.

☒ Subscription Code

Subscription Title

Vendor

Subscription Reports Sort By Options

- Subscription Code**—The report will be sorted by the subscription code.
- Subscription Title**—The report will be sorted by the subscription title.
- Vendor**—The report will be sorted by the orders’ vendor name.

☒ All Subscriptions

Missing Subscriptions

Renewal Date

Subscription Code

Subscription Vendor

Subscription Reports Select By Options

- All Subscriptions**—Includes all subscriptions in the report.
- Renewal Date**—Includes subscription with renewal dates in a specified range.
- Subscription Code**—Includes subscriptions with codes in a specified range.
- Subscription Vendor**—Includes subscriptions with vendors in a specified range.
- Missing Subscriptions**—Includes only those subscriptions that have not been received as expected. Use this selection to ensure that the library is receiving all items.

# Alexandria Utilities

Most operations in Alexandria are designed to modify individual pieces of data one entry at a time. Utilities can change large amounts of information in your Alexandria database with a single command.

## How to Initiate a Utility

From the **File** menu, select **Utilities**.



Use the following steps to run a utility.

### WARNING !

Running any utility could be potentially harmful to your data! Before you use any **Utility**, you need to **Archive** your data. Thus, if you discover that you've performed an operation that has damaged your data, you can recover from a previous archive.

- Step 1. Select a utility type from the **Utility Type** drop-down menu.
- Step 2. If the utility you've selected has more than one option, an **Operation** drop-down menu appears. Select an **Operation** from the drop-down menu.
- Step 3. Some operations require additional information. Fill in the specific information as required by the utility.
- Step 4. Use the **Select By** drop-down menu to select which records are to be processed by the utility. You can make up to six selections with **And**, **Or**, and **And Not** (Boolean logic).

When you choose values in the selection drop-down menus, other fields may appear, asking for additional information.

- Step 5. Press the **OK** button. As Alexandria performs the utility, a **Status** window appears. You can abort the utility by clicking **Cancel**. Note, this will only stop the utility in its tracks; any records modified before you stop the utility will remain modified.

**NOTE:**

User's may perform tasks while some utilities are processing.

However, **UNDER NO CIRCUMSTANCES** should you ever do **anything** during the **Rebuild** utility.

Step 6. When *some* utilities are processing, you may perform other tasks within Alexandria. For example, you may issue items or prepare a report. Some utilities reports execute at lower priorities than other Alexandria processes. Thus, if you run a **Report**, the utility will rest while the report is processing.

If the utility status window is hidden behind other windows, select it from the **Windows** menu to bring it to the forefront.

Step 7. When the utility is complete, the **Status** window automatically closes and a "utility complete" entry is placed in the **Transaction log**. Many utility functions will create entries in the log so you can monitor which records have been modified.

- ✓ Items
- Patrons
- Circulation
- Check for Updates
- Database
- Catalog Utilities
- Verify Utilities

- ✓ Verify
- Replace Information
- Modify Call Numbers
- Remove Title
- Remove Copy
- Remove Archived Copies
- Remove Lost Copies
- Remove Discarded Copies
- Remove Copy Transactions
- Remove NetLink II Items
- Remove NetLink III Items
- Match Title to Copy Call Numbers
- Match Copy to Title Call Numbers
- Match Title Policies
- Check Out

## Item Utilities

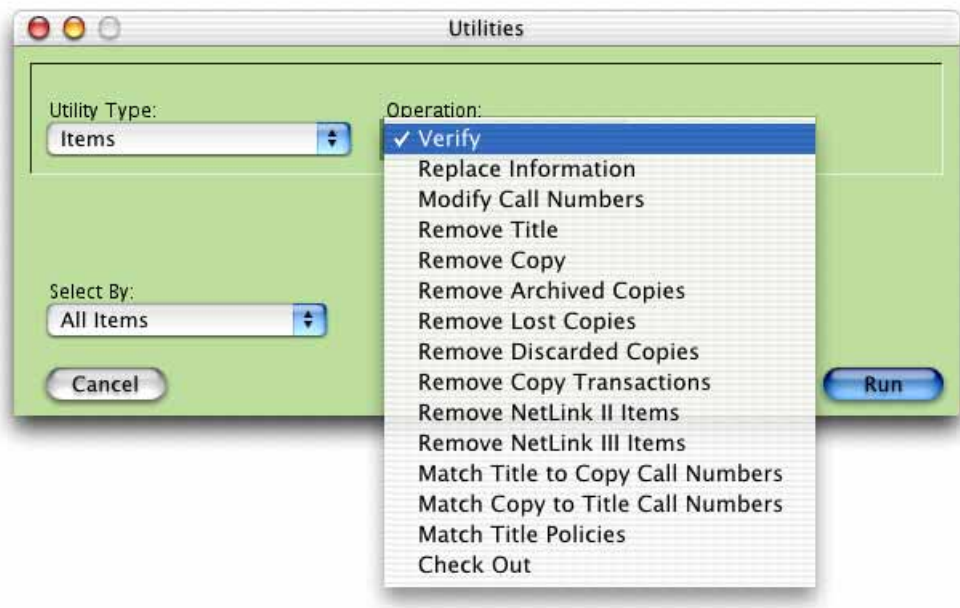
Item utilities are used to modify groups of items in your collection. These utilities let you easily and quickly add, modify, and remove information for large groups of items. For example, you can remove groups of items, replace copy locations for groups of items, and change call number prefixes for a group of items.

To make changes to a group of items, that group must have something in common for Alexandria to select. For example, you can change the location for all items in a certain medium type.

**Items** utilities can be performed on many different groups of items. The **Select By** options available are the same as **Item Reports** (see “Item Reports Select By Options” on page 416).

## Items: Verify

Use this utility to verify the internal status of item groups. This procedure reviews statistical information and the internal data relations of your items. If problems are found, they are automatically fixed. If you’ve had data your damaged due to power outages or hardware failures, you should run this utility to repair any damage.



## Verify Select By Options

The **Verify Select By** options are identical to the **Item Reports Select By** options “Item Reports Select By Options” on page 416.



✓ Items  
 Patrons  
 Circulation  
 Check for Updates  
 Database  
 Catalog Utilities  
 Verify Utilities

✓ Verify  
 Replace Information  
 Modify Call Numbers  
 Remove Title  
 Remove Copy  
 Remove Archived Copies  
 Remove Lost Copies  
 Remove Discarded Copies  
 Remove Copy Transactions  
 Remove NetLink II Items  
 Remove NetLink III Items  
 Match Title to Copy Call Numbers  
 Match Copy to Title Call Numbers  
 Match Title Policies  
 Check Out

✓ Item Policy  
 Copy Library  
 Copy Location  
 Shelving  
 Don't Show in Researcher  
 Funding Source  
 Replacement Cost

✓ Title & Copies  
 Titles Only  
 Copies Only

## Items: Replace Information

Use this utility to change an existing value to a new value for a group of items.

### Replace Information Replace Selections

**Item Policy**—Replaces the policy for the selected copies. If you select **Titles & Copies**, all copies for that title are also updated. Use the drop-down menu to specify which policies are modified.

**Copy Library**—Replaces an item's (or range of items) library data with whatever data you specify.

**Copy Location**—Replaces an item's (or range of items) location data with whatever data you specify.

**Shelving**—A second location indicator option if you want to further detail the location of items on specific shelves at your location (note: this terminology can be customized in your **Item Management** preferences under **Caption for Shelving Location**).

**Don't Show in Researcher**—Sets the **Don't Show in Alexandria Researcher** checkbox to **ON** for all selected titles.

**Funding Source**—Replaces an item's (or range of items) funding source with whatever data you specify.

**Replacement Cost**—Replaces an item's (or range of items) replacement cost with whatever data you specify.

### Replace Information With Options

These options will change and grow as you create more policies. What will appear in this drop down menu also depends on which **Replace** option you select.

**Standard Item**—Replaces information in **Standard** items only.

**System Item**—Replaces information in **System** items only.

### Replace Information Modify Options

**Titles & Copies**—Replaces a specified value in both titles and copies.

**Titles Only**—Replaces information for titles only.

**Copies Only**—Replaces specified value for copies only.

### Replace Information Select By Options

The **Replace Information Select By** options are the same as the **Item Reports Select By** options “*Item Reports Select By Options*” on page 416.

✓ Items  
Patrons  
Circulation  
Check for Updates  
Database  
Catalog Utilities  
Verify Utilities

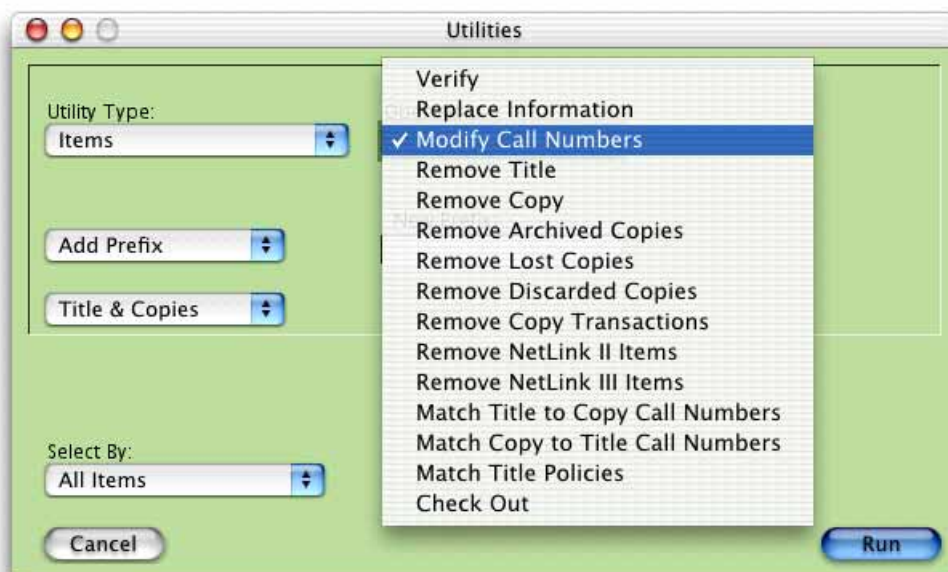
✓ Verify  
Replace Information  
Modify Call Numbers  
Remove Title  
Remove Copy  
Remove Archived Copies  
Remove Lost Copies  
Remove Discarded Copies  
Remove Copy Transactions  
Remove NetLink II Items  
Remove NetLink III Items  
Match Title to Copy Call Numbers  
Match Copy to Title Call Numbers  
Match Title Policies  
Check Out

✓ Add Prefix  
Replace Prefix  
Remove Prefix  
Change Case  
Remove Slashes

✓ Title & Copies  
Titles Only  
Copies Only

## Items: Modify Call Numbers

Use this utility to modify call numbers for titles and/or copies. Only the records selected using the **Select By** drop-down menu are examined or modified.



### Modify Call Numbers Operation Selections

**Add Prefix**—Adds a specified prefix to selected items. When this option is selected, a **New Prefix** field will appear, allowing you to specify a modifier.

**Replace Prefix**—Replaces a specified prefix with a new value. When this option is selected, **Replace Prefix** and **With** fields appear, allowing you to specify a modifier.

**Remove Prefix**—Removes a specified prefix in matching records. When this option is selected, a **Remove Prefix** field appears, allowing you to input the value you wanted removed.

**Change Case**—Changes the specified case in titles or copy call numbers. When this option is selected, you may choose from the subsequent drop-down **To:** menu: **First Letter Uppercase**, **All Letters Uppercase**, or **All Letters Lowercase**.

**Remove Slashes**—Removes slashes within title or copy call numbers.

### Modify Call Numbers Modify Options

**Titles & Copies**—Replaces a specified value in both titles and copy call numbers.

**Titles Only**—Replaces information for titles call numbers only.

**Copies Only**—Replaces a specified value for copy call numbers only.

### Modify Call Numbers Select By Options

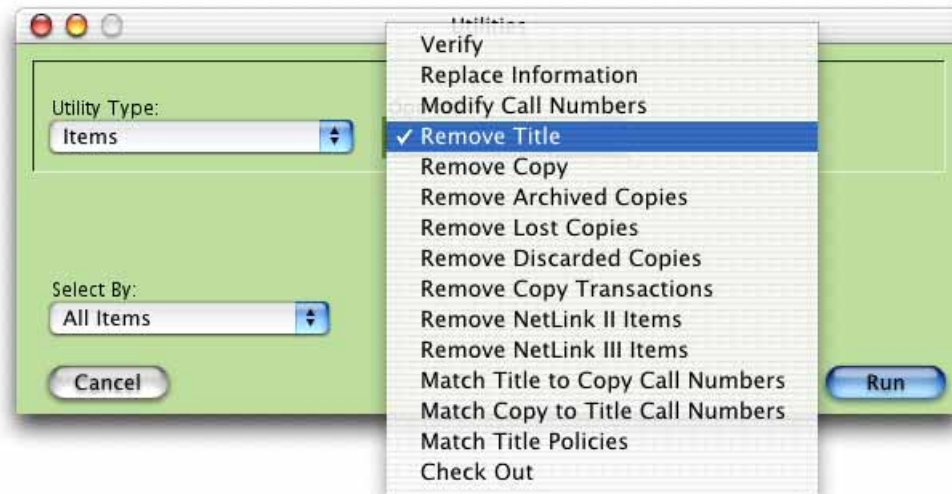
The **Modify Call Numbers Select By** options are the same as the **Item Reports Select By** options “*Item Reports Select By Options*” on page 416.

✓ Items  
 Patrons  
 Circulation  
 Check for Updates  
 Database  
 Catalog Utilities  
 Verify Utilities

✓ Verify  
 Replace Information  
 Modify Call Numbers  
 Remove Title  
 Remove Copy  
 Remove Archived Copies  
 Remove Lost Copies  
 Remove Discarded Copies  
 Remove Copy Transactions  
 Remove NetLink II Items  
 Remove NetLink III Items  
 Match Title to Copy Call Numbers  
 Match Copy to Title Call Numbers  
 Match Title Policies  
 Check Out

## Items: Remove Title

Use this utility to remove groups of titles. All selected titles are *permanently* removed from Alexandria.



This utility does not remove titles that currently have copies checked out. Only copies that are *not* checked out are removed. When a title is removed, all pending holds are also removed. When copies are removed, all reservations for those copies are removed.

## Remove Title Select By Options

The **Remove Title Select By** options are the same as the **Item Reports Select By** options “*Item Reports Select By Options*” on page 416.

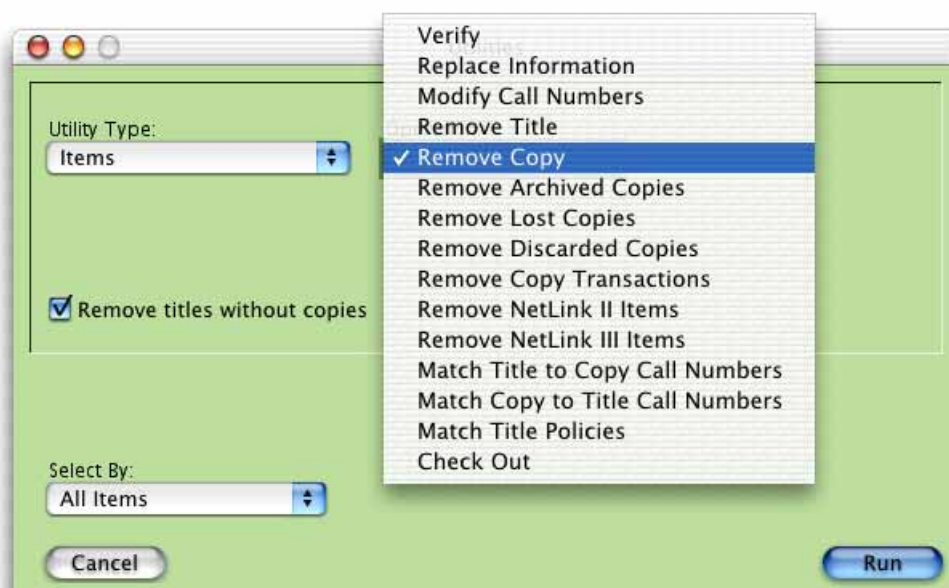
✓ Items  
 Patrons  
 Circulation  
 Check for Updates  
 Database  
 Catalog Utilities  
 Verify Utilities

## Items: Remove Copy

Use this utility to remove a group of item copies. All selected copies are *permanently* removed from Alexandria. This utility does not remove copies that are checked out.

If all the copies for a title are removed, the title will also be removed if the **Remove titles without copies** checkbox is marked. When copies are removed, all reservations for the copies are also removed.

✓ Verify  
 Replace Information  
 Modify Call Numbers  
 Remove Title  
 Remove Copy  
 Remove Archived Copies  
 Remove Lost Copies  
 Remove Discarded Copies  
 Remove Copy Transactions  
 Remove NetLink II Items  
 Remove NetLink III Items  
 Match Title to Copy Call Numbers  
 Match Copy to Title Call Numbers  
 Match Title Policies  
 Check Out



**Remove titles without copies**—When this box is checked, you will be able to remove titles without any subsequent copies.

## Remove Copy Select By Options

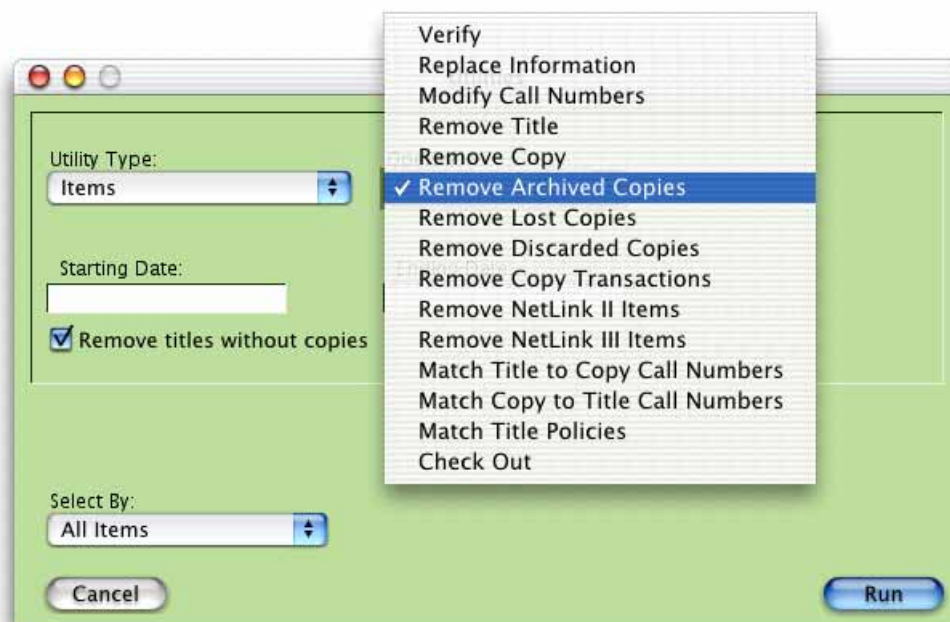
The **Remove Copy Select By** options are the same as the **Item Reports Select By** options “*Item Reports Select By Options*” on page 416.

- ✓ Items
- Patrons
- Circulation
- Check for Updates
- Database
- Catalog Utilities
- Verify Utilities

## Items: Remove Archived Copies

This utility removes all copies that had their status set to **Archived** between the **Starting** and **Ending** dates specified. If you leave the **Starting Date** blank, Alexandria uses "January 1, 1900." If you leave the **Ending Date** blank, Alexandria uses "January 1, 2050." Thus, if you leave both dates blank, all archived copies will be removed. The title record will also be removed if the **Remove titles without copies** checkbox is marked and there are no remaining copies for that title.

- ✓ Verify
- Replace Information
- Modify Call Numbers
- Remove Title
- Remove Copy
- Remove Archived Copies
- Remove Lost Copies
- Remove Discarded Copies
- Remove Copy Transactions
- Remove NetLink II Items
- Remove NetLink III Items
- Match Title to Copy Call Numbers
- Match Copy to Title Call Numbers
- Match Title Policies
- Check Out



**Remove titles without copies**—When this box is checked, you will be able to remove titles without any subsequent copies.

## Remove Archived Copies Select By Options

The **Remove Archived Copies Select By** options are the same as the **Item Reports Select By** options "Item Reports Select By Options" on page 416.

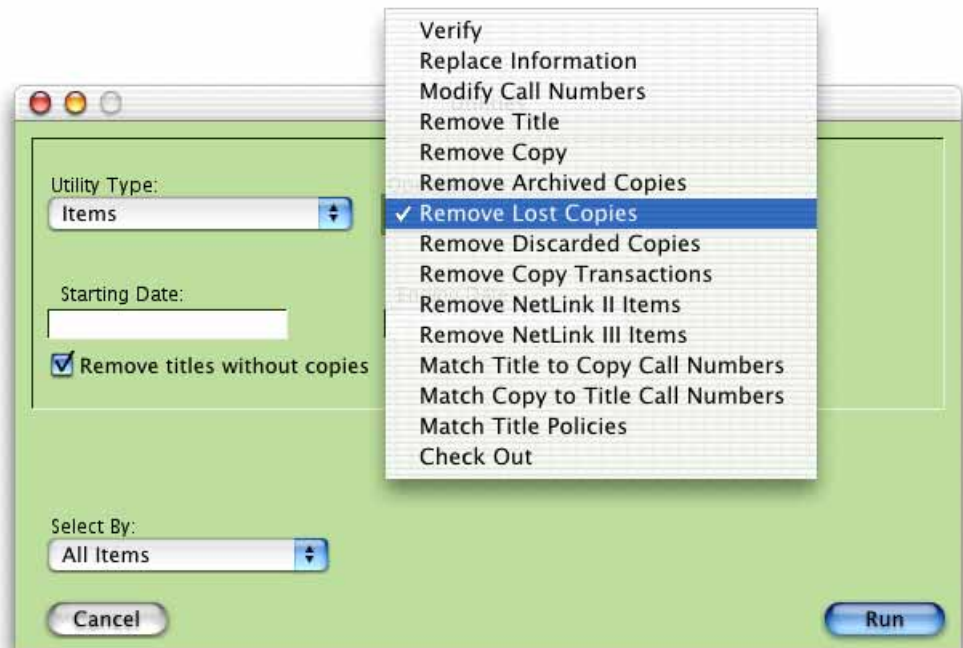


- ✓ Items
- Patrons
- Circulation
- Check for Updates
- Database
- Catalog Utilities
- Verify Utilities

## Items: Remove Lost Copies

This utility removes all copies which had their status set to **Lost** between the **Starting** and **Ending** dates specified. If you leave the **Starting Date** blank, Alexandria uses "January 1, 1900." If you leave the **Ending Date** blank, Alexandria uses "January 1, 2050." Thus, if you leave both dates blank, all lost copies are removed. The title record will also be removed if the **Remove titles without copies** checkbox is selected and there are no remaining copies for that title.

- ✓ Verify
- Replace Information
- Modify Call Numbers
- Remove Title
- Remove Copy
- Remove Archived Copies
- Remove Lost Copies
- Remove Discarded Copies
- Remove Copy Transactions
- Remove NetLink II Items
- Remove NetLink III Items
- Match Title to Copy Call Numbers
- Match Copy to Title Call Numbers
- Match Title Policies
- Check Out



**Remove titles without copies**—When this box is checked, you will be able to remove titles without any subsequent copies.

## Remove Lost Copies Select By Options

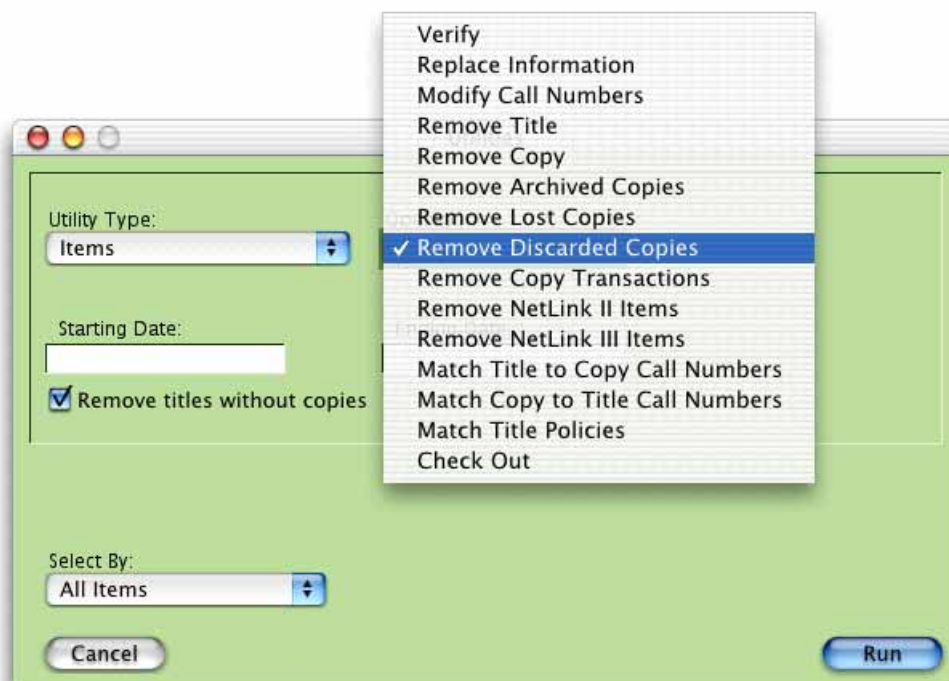
The **Remove Lost Copies Select By** options are the same as the **Item Reports Select By** options "Item Reports Select By Options" on page 416.

✓ Items  
 Patrons  
 Circulation  
 Check for Updates  
 Database  
 Catalog Utilities  
 Verify Utilities

## Items: Remove Discarded Copies

This utility removes all copies which had their status set to **Discarded** between the **Starting** and **Ending** dates specified. If you leave the **Starting Date** blank, Alexandria uses "January 1, 1900." If you leave the **Ending Date** blank, Alexandria uses "January 1, 2050." Thus, if you leave both dates blank, all discarded copies are removed. The title record will also be removed if the **Remove titles without copies** checkbox is marked and there are no remaining copies for that title.

✓ Verify  
 Replace Information  
 Modify Call Numbers  
 Remove Title  
 Remove Copy  
 Remove Archived Copies  
 Remove Lost Copies  
 Remove Discarded Copies  
 Remove Copy Transactions  
 Remove NetLink II Items  
 Remove NetLink III Items  
 Match Title to Copy Call Numbers  
 Match Copy to Title Call Numbers  
 Match Title Policies  
 Check Out



**Remove titles without copies**—When this box is checked, you will be able to remove titles without any subsequent copies.

### Remove Discarded Copies Select By Options

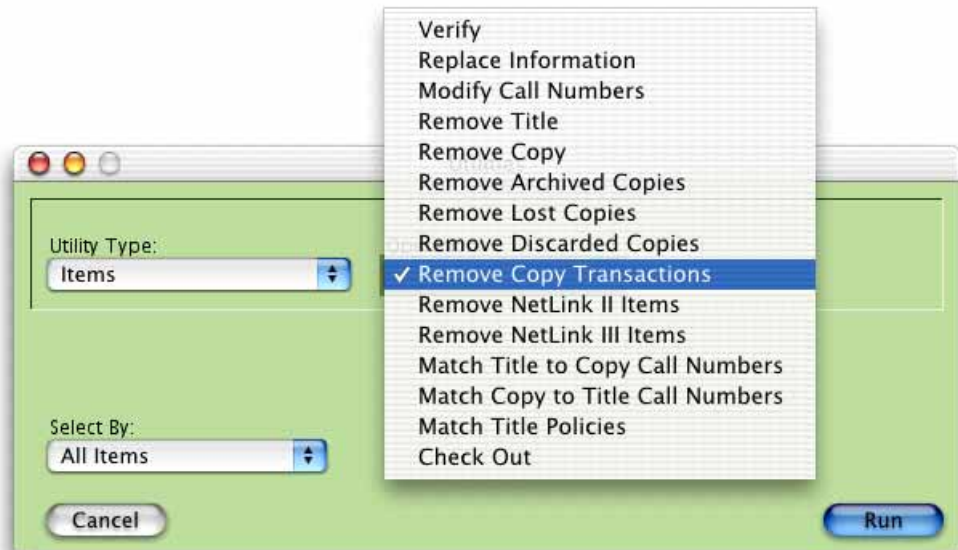
The **Remove Discarded Copies Select By** options are the same as the **Item Reports Select By** options "Item Reports Select By Options" on page 416.

- ✓ Items
- Patrons
- Circulation
- Check for Updates
- Database
- Catalog Utilities
- Verify Utilities

- ✓ Verify
- Replace Information
- Modify Call Numbers
- Remove Title
- Remove Copy
- Remove Archived Copies
- Remove Lost Copies
- Remove Discarded Copies
- Remove Copy Transactions
- Remove NetLink II Items
- Remove NetLink III Items
- Match Title to Copy Call Numbers
- Match Copy to Title Call Numbers
- Match Title Policies
- Check Out

## Items: Remove Copy Transactions

This utility removes all selected copy transactions.



### WARNING !

Do not run this utility unless you want to lose **Circulation** status and details for the selected copies!

### Remove Copy Transactions Select By Options

The **Remove Copy Transactions Select By** options are the same as the **Item Reports Select By** options “*Item Reports Select By Options*” on page 416.



- ✓ Items
- Patrons
- Circulation
- Check for Updates
- Database
- Catalog Utilities
- Verify Utilities

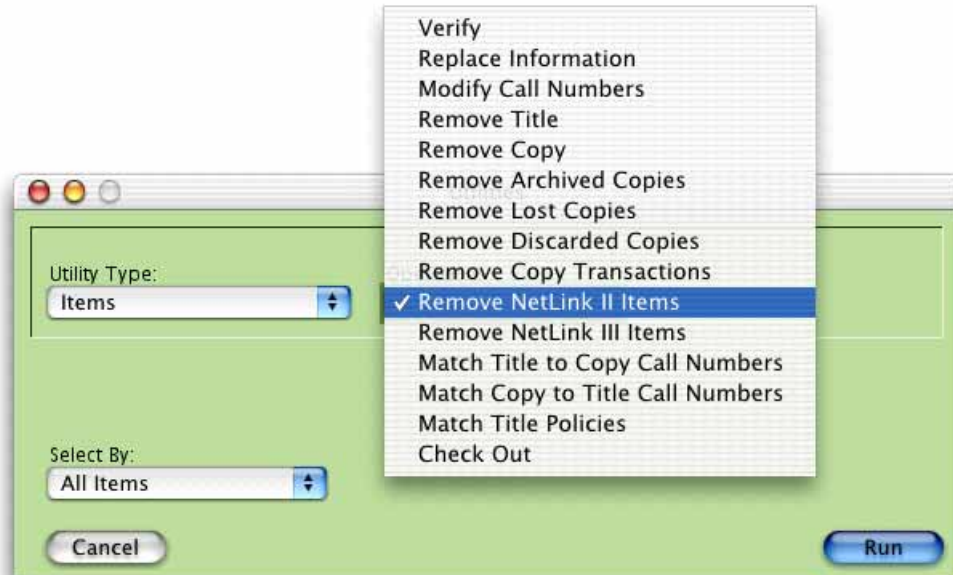
## Items: Remove NetLink II

### - N O T E -

Netlink is an optional feature of Alexandria; this **Utility** will only appear if you are licensed to use the Netlink module.

This utility removes all selected records from your collection that were part of the **NetLink II** add-on package.

- ✓ Verify
- Replace Information
- Modify Call Numbers
- Remove Title
- Remove Copy
- Remove Archived Copies
- Remove Lost Copies
- Remove Discarded Copies
- Remove Copy Transactions
- Remove NetLink II Items
- Remove NetLink III Items
- Match Title to Copy Call Numbers
- Match Copy to Title Call Numbers
- Match Title Policies
- Check Out



## Remove NetLink II Select By Options

The **Remove NetLink II Select By** options are the same as the **Item Reports Select By** options “*Item Reports Select By Options*” on page 416.

- ✓ Items
- Patrons
- Circulation
- Check for Updates
- Database
- Catalog Utilities
- Verify Utilities

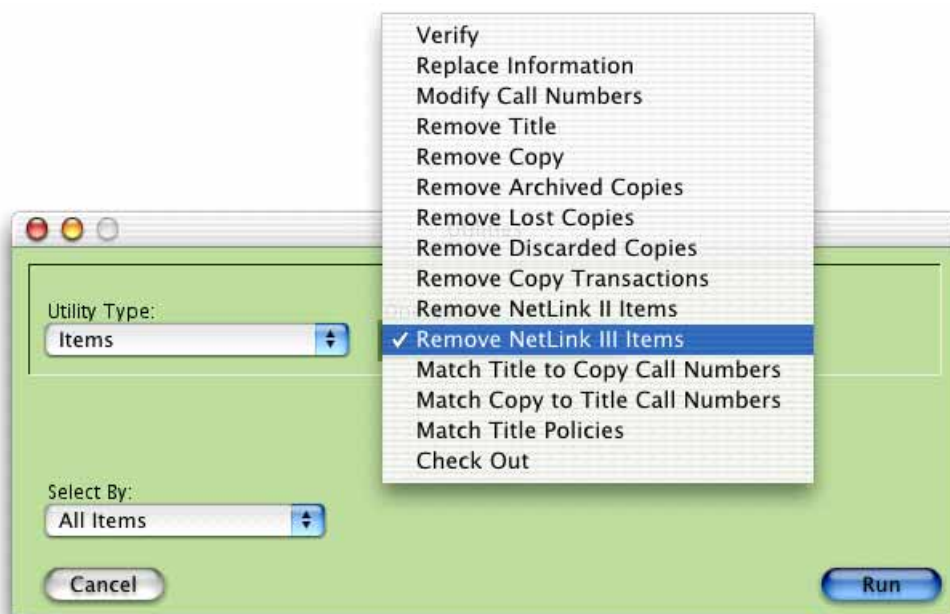
## Items: Remove NetLink III

### - N O T E -

Netlink is an optional feature of Alexandria; this **Utility** will only appear if you are licensed to use the Netlink module.

This utility removes all selected records from your collection that were part of the **NetLink III** add-on package.

- ✓ Verify
- Replace Information
- Modify Call Numbers
- Remove Title
- Remove Copy
- Remove Archived Copies
- Remove Lost Copies
- Remove Discarded Copies
- Remove Copy Transactions
- Remove NetLink II Items
- Remove NetLink III Items
- Match Title to Copy Call Numbers
- Match Copy to Title Call Numbers
- Match Title Policies
- Check Out



## Remove NetLink III Select By Options

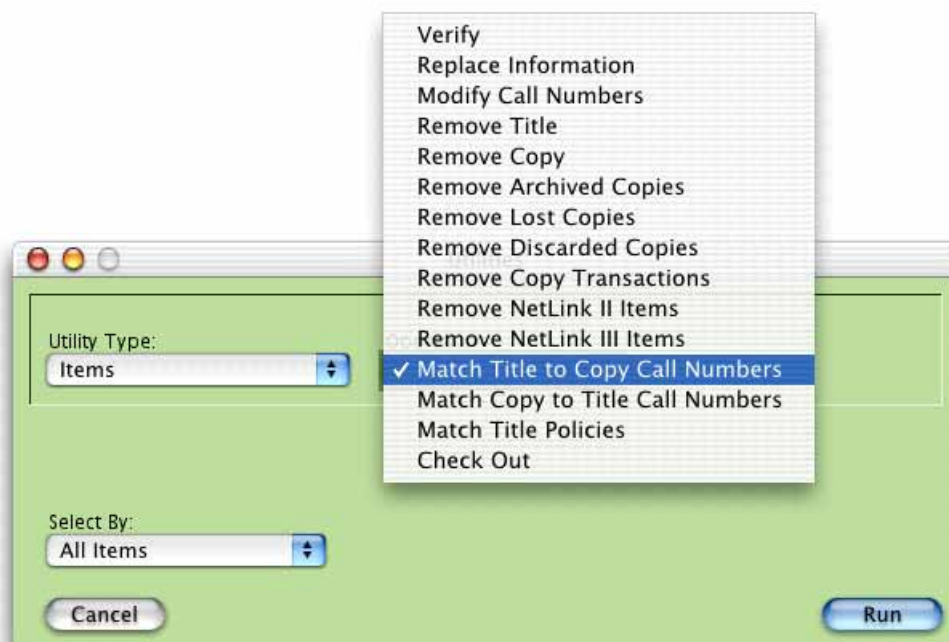
The **Remove NetLink III Select By** options are the same as the **Item Reports Select By** options “*Item Reports Select By Options*” on page 416.

- ✓ Items
- Patrons
- Circulation
- Check for Updates
- Database
- Catalog Utilities
- Verify Utilities

- ✓ Verify
- Replace Information
- Modify Call Numbers
- Remove Title
- Remove Copy
- Remove Archived Copies
- Remove Lost Copies
- Remove Discarded Copies
- Remove Copy Transactions
- Remove NetLink II Items
- Remove NetLink III Items
- Match Title to Copy Call Numbers
- Match Copy to Title Call Numbers
- Match Title Policies
- Check Out

## Items: Match Title to Copy Call Numbers

This utility matches the copy call number to the existing title call number for all selected copies.



## Match Title to Copy Call Numbers Select By Options

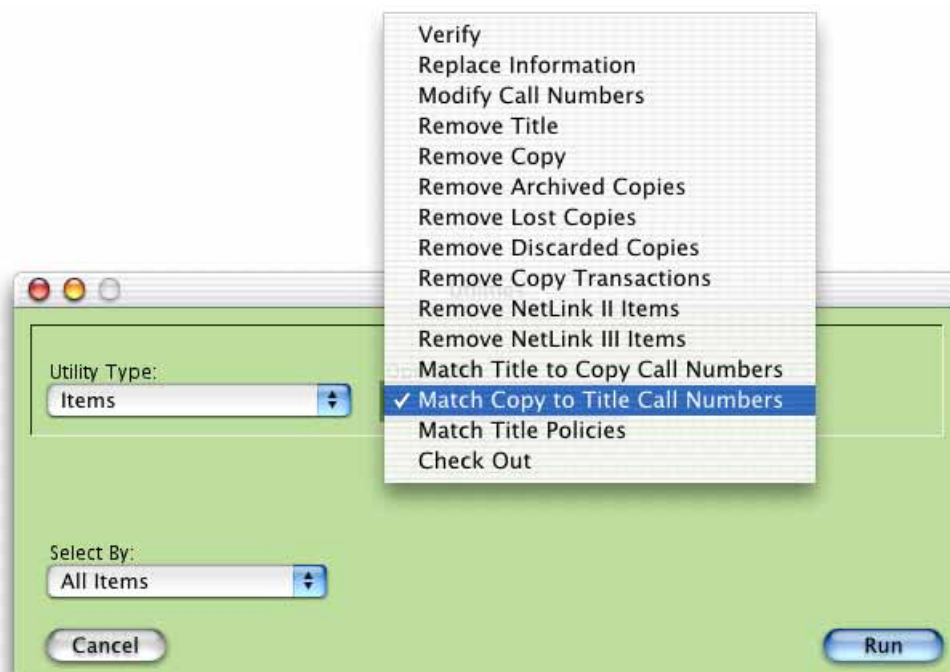
The **Match Title to Copy Call Numbers Select By** options are the same as the **Item Reports Select By** options “*Item Reports Select By Options*” on page 416.

- ✓ Items
- Patrons
- Circulation
- Check for Updates
- Database
- Catalog Utilities
- Verify Utilities

- ✓ Verify
- Replace Information
- Modify Call Numbers
- Remove Title
- Remove Copy
- Remove Archived Copies
- Remove Lost Copies
- Remove Discarded Copies
- Remove Copy Transactions
- Remove NetLink II Items
- Remove NetLink III Items
- Match Title to Copy Call Numbers
- Match Copy to Title Call Numbers
- Match Title Policies
- Check Out

## Items: Match Copy to Title Call Numbers

If the title call number doesn't match any of the copy call numbers, this utility takes the call number of the first copy and applies it to the title call number. This utility will not affect any of the copy call numbers.



## Match Copy to Title Call Numbers Select By Options

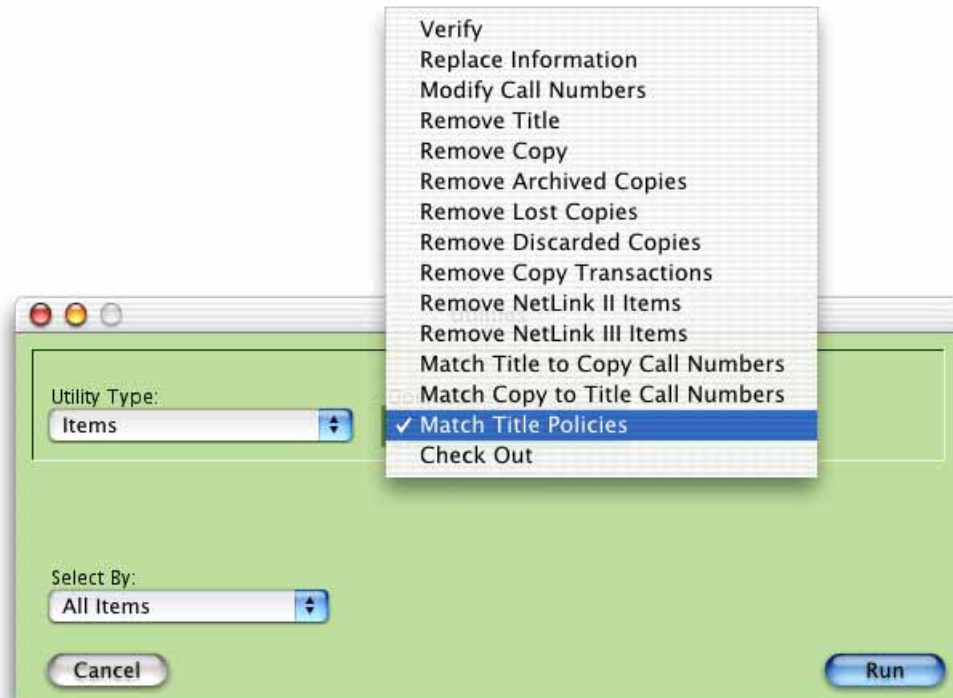
The **Match Copy to Title Call Numbers Select By** options are the same as the **Item Reports Select By** options “*Item Reports Select By Options*” on page 416.

- ✓ Items
- Patrons
- Circulation
- Check for Updates
- Database
- Catalog Utilities
- Verify Utilities

- ✓ Verify
- Replace Information
- Modify Call Numbers
- Remove Title
- Remove Copy
- Remove Archived Copies
- Remove Lost Copies
- Remove Discarded Copies
- Remove Copy Transactions
- Remove NetLink II Items
- Remove NetLink III Items
- Match Title to Copy Call Numbers
- Match Copy to Title Call Numbers
- Match Title Policies
- Check Out

## Items: Match Title Policies

This utility applies the title policy to all selected copies.



## Match Title Policies Select By Options

The **Match Title Policies Select By** options are the same as the **Item Reports Select By** options “*Item Reports Select By Options*” on page 416.

✓ Items  
 Patrons  
 Circulation  
 Check for Updates  
 Database  
 Catalog Utilities  
 Verify Utilities

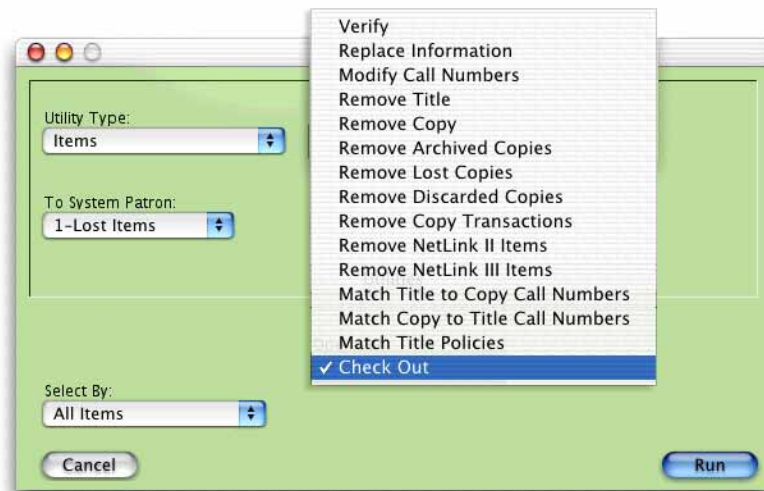
✓ Verify  
 Replace Information  
 Modify Call Numbers  
 Remove Title  
 Remove Copy  
 Remove Archived Copies  
 Remove Lost Copies  
 Remove Discarded Copies  
 Remove Copy Transactions  
 Remove NetLink II Items  
 Remove NetLink III Items  
 Match Title to Copy Call Numbers  
 Match Copy to Title Call Numbers  
 Match Title Policies  
 Check Out

✓ 1-Lost Items  
 2-Discarded Items  
 3-Library Use Items  
 4-On Repair Items  
 5-On Order Items  
 6-Archived Items

✓ Selection  
 Lost Items  
 Discarded Items  
 Library Use Items  
 On Repair Items  
 On Order Items  
 Archived Items

## Items: Check Out

This utility checks items out from a specified selection to a **System Patron**. It also transfers items from one **System Patron** status to another.



## Check Out To System Patron Selections

**1-Lost Items**—Checks out or transfers items to the **Lost Items System Patron**.

**2-Discarded Items**—Checks out or transfers items to the **Discarded Items System Patron**.

**3-Library Use Items**—Checks out or transfers items to the **Library Use Items System Patron**.

**4-On Repair Items**—Checks out or transfers items to the **On Repair Items System Patron**.

**5-On Order Items**—Checks out or transfers items to the **On Order Items System Patron**.

**6-Archived Items**—Checks out or transfers items to the **Archived Items System Patron**.

## Check Out From Options

**Selection**—Checks out based on your selection from the **Select By** drop-down menu.

**1-Lost Items**—Checks out from the **Lost Items System Patron**.

**2-Discarded Items**—Checks out from the **Discarded Items System Patron**.

**3-Library Use Items**—Checks out from the **Library Use Items System Patron**.

**4-On Repair Items**—Checks out from the **On Repair Items System Patron**.

**5-On Order Items**—Checks out from the **On Order Items System Patron**.

**6-Archived Items**—Checks out from the **Archived Items System Patron**.

## Check Out Select By Options

The **Check Out Select By** options are the same as the **Item Reports Select By** options “*Item Reports Select By Options*” on page 416.



- ✓ Items
- Patrons
- Circulation
- Check for Updates
- Database
- Catalog Utilities
- Verify Utilities

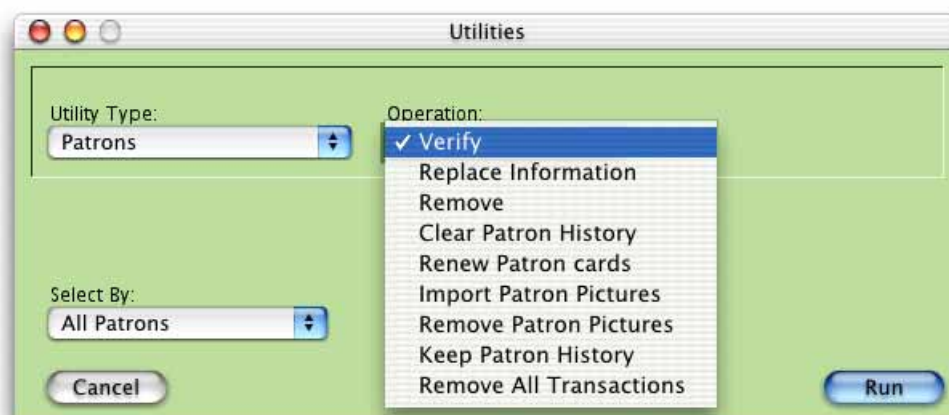
- ✓ Verify
- Replace Information
- Remove
- Clear Patron History
- Renew Patron cards
- Import Patron Pictures
- Remove Patron Pictures
- Keep Patron History
- Remove All Transactions

## Patron Utility Types

Use Alexandria utilities to change or remove groups of patrons. For example, there are utilities to change patron policies, renew expired cards, and update expiration dates. Patrons may be selected from the same **Select By** criteria as **Patron Reports** (see “Patron Report Select By Options” on page 395).

### Patrons: Verify

Use this utility to verify and review the data and status of a group of patrons. This procedure reviews all the circulation information and statistics for the patrons selected and ensures that it is accurate. This procedure also examines the graduation year for each patron and adjusts the grade to match.



### Verify Select By Options

The **Verify Select By** options are the same as the **Patron Reports Select By** options (see “Patron Report Select By Options” on page 395).

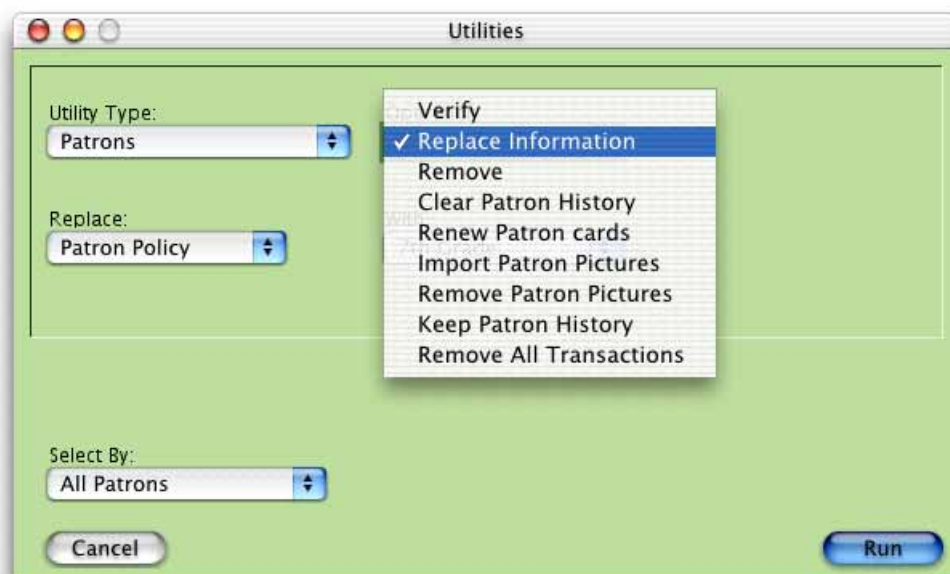
- ✓ Items
  - Patrons
  - Circulation
  - Check for Updates
  - Database
  - Catalog Utilities
  - Verify Utilities

- ✓ Verify
  - Replace Information
  - Remove
  - Clear Patron History
  - Renew Patron cards
  - Import Patron Pictures
  - Remove Patron Pictures
  - Keep Patron History
  - Remove All Transactions

- ✓ Patron Policy
  - Homeroom
  - 2nd Location
  - School
  - Grade
  - Card Expiration
  - Graduation Date

## Patrons: Replace Information

Use this utility to change existing values to new value for a group of patrons. The following options are available:



## Replace Information Operation Selections

**Patron Policy**—Replaces the policies for the selected patrons.

**Homeroom**—Replaces the location field for selected patrons. In schools, this field is typically the homeroom.

**2nd Location**—Replaces the second location field for selected patrons.

**Card Expiration**—Replaces the card expiration date with a specified date.

**School**—Replaces the school name field for selected patrons.

**Grade**—Replaces the grade field for selected patrons.

**Card Expiration**—Updates and replaces the card expiration date with a specified date.

**Graduation Date**—Replaces the graduation date with a specified date.

## Replace Information With Options

These options will change and grow as you create more policies. What will appear in this drop down menu also depends on which **Replace** option you select.

**Standard Item**—Replaces information in **Standard** items only.

**System Item**—Replaces information in **System** items only.

## Replace Information Select By Options

The **Replace Information Select By** options are the same as the **Patron Reports Select By** options (see “Patron Report Select By Options” on page 395)



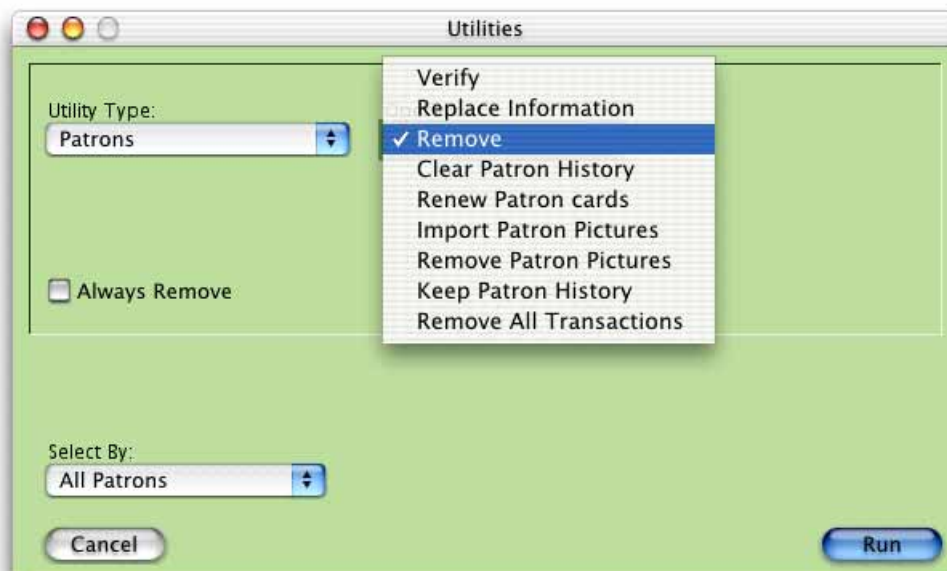
- ✓ Items
- Patrons
- Circulation
- Check for Updates
- Database
- Catalog Utilities
- Verify Utilities

## Patrons: Remove

Use this utility to remove a group of patrons. Use the **Select By** drop-down menu to select the patrons you want to remove. This utility does not remove patrons who have items checked out or have a current balance due to the library.

When a patron is removed, all their holds, reservations and in-stock holds are also removed. If there are any **Patron History** records, all but **Payment History** is removed.

- ✓ Verify
- Replace Information
- Remove
- Clear Patron History
- Renew Patron cards
- Import Patron Pictures
- Remove Patron Pictures
- Keep Patron History
- Remove All Transactions



**Always Remove**—If you select this checkbox, items checked out to patrons that are going to be removed are marked as **Lost** and any pending fines or charges are forgiven—the patron is then removed.

## Remove Select By Options

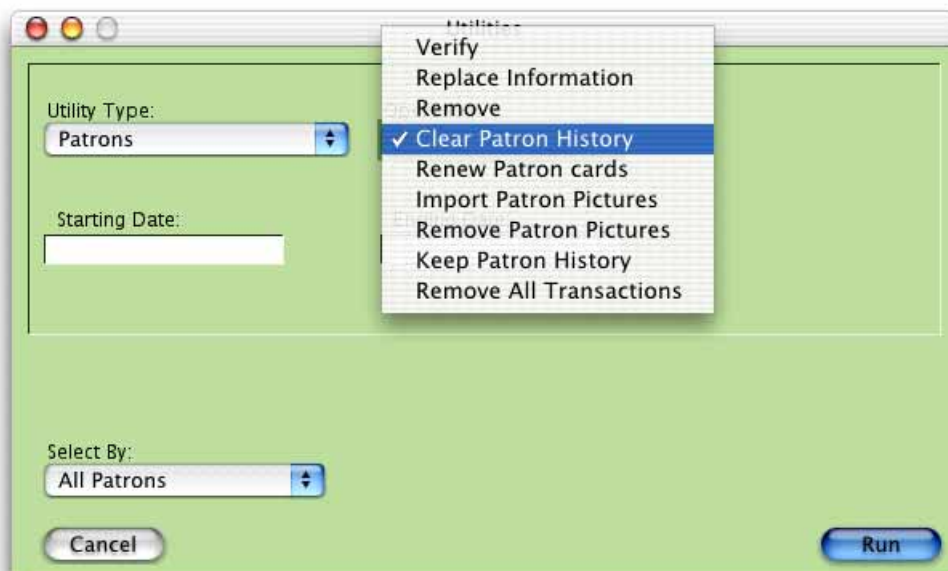
The **Remove Select By** options are the same as the **Patron Reports Select By** options (see *"Patron Report Select By Options"* on page 395)

- ✓ Items
- Patrons
- Circulation
- Check for Updates
- Database
- Catalog Utilities
- Verify Utilities

- ✓ Verify
- Replace Information
- Remove
- Clear Patron History
- Renew Patron cards
- Import Patron Pictures
- Remove Patron Pictures
- Keep Patron History
- Remove All Transactions

## Patrons: Clear Patron History

This utility removes all patron history records that were created between the **Starting** and **Ending** dates specified. If you leave the **Starting Date** blank, Alexandria uses "January 1, 1900." If you leave the **Ending Date** blank, Alexandria uses "January 1, 2050." Thus, if you leave both dates blank, all lost copies are removed.



### Clear Patron History Select By Options

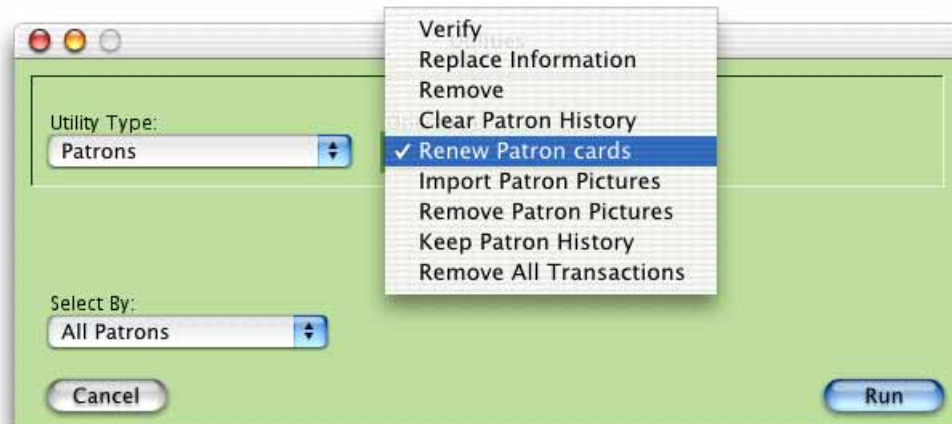
The **Clear Patron History Select By** options are the same as the **Patron Reports Select By** options (see "Patron Report Select By Options" on page 395)

- ✓ Items
- Patrons
- Circulation
- Check for Updates
- Database
- Catalog Utilities
- Verify Utilities

- ✓ Verify
- Replace Information
- Remove
- Clear Patron History
- Renew Patron cards
- Import Patron Pictures
- Remove Patron Pictures
- Keep Patron History
- Remove All Transactions

## Patrons: Renew Patron Cards

Renews any patron cards that have expired or will expire in the next two weeks. Card is renewed for the period specified in the patron policy.



## Renew Patron Cards Select By Options

The **Renew Patron Cards Select By** options are the same as the **Patron Reports Select By** options (see *"Patron Report Select By Options"* on page 395)

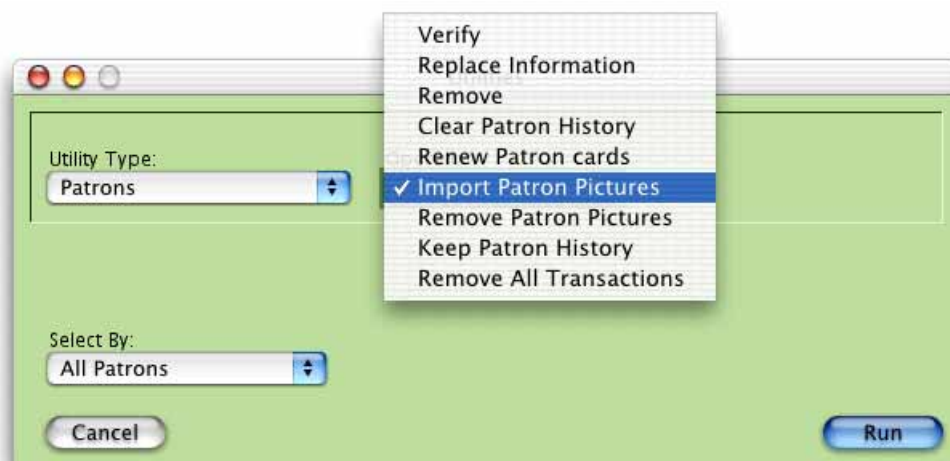
- ✓ Items
- Patrons
- Circulation
- Check for Updates
- Database
- Catalog Utilities
- Verify Utilities

- ✓ Verify
- Replace Information
- Remove
- Clear Patron History
- Renew Patron cards
- Import Patron Pictures
- Remove Patron Pictures
- Keep Patron History
- Remove All Transactions

## Patrons: Import Patron Pictures

Use this utility to import patron pictures into Alexandria. Running this utility opens up a standard operating system explorer window. Guide Alexandria to the directory folder, CD-ROM, or storage media device containing your patron pictures. Alexandria will attempt to match your pictures to your patrons depending on the image filenames.

For example, let's say that you have a student named John Doe whose barcode in Alexandria is 1080 and you would like to import a "jpeg" picture of him. His picture file must be named "1080 . jpg" so that Alexandria can match it to John's barcode. If all your patron image files were created using patron barcode numbers (e.g. "1080 . jpg"), then Alexandria will individually import each picture into your patron data, accessible through **Patron Management**.



The **Import Patron Pictures** utility will first attempt to match the filename by **Barcode**, then **Govt ID**, and finally **Community ID** (see page 183 for more information about Govt ID and Community ID). If Alexandria is unable to match your filename to a patron using the above criteria, the picture will be ignored and reported in the **Transaction log**.

You can import most standard image files in Alexandria (i.e. **GIF, JPEG, BMP, PICT**).

### Import Patron Pictures Select By Options

The **Import Patron Pictures Select By** options are the same as the **Patron Reports Select By** options (see "Patron Report Select By Options" on page 395)

- ✓ Items
- Patrons
- Circulation
- Check for Updates
- Database
- Catalog Utilities
- Verify Utilities

- ✓ Verify
- Replace Information
- Remove
- Clear Patron History
- Renew Patron cards
- Import Patron Pictures
- Remove Patron Pictures
- Keep Patron History
- Remove All Transactions

## Patrons: Remove Patron Pictures

Use this utility to remove pictures from a selection of patrons.



### Remove Patron Pictures Select By Options

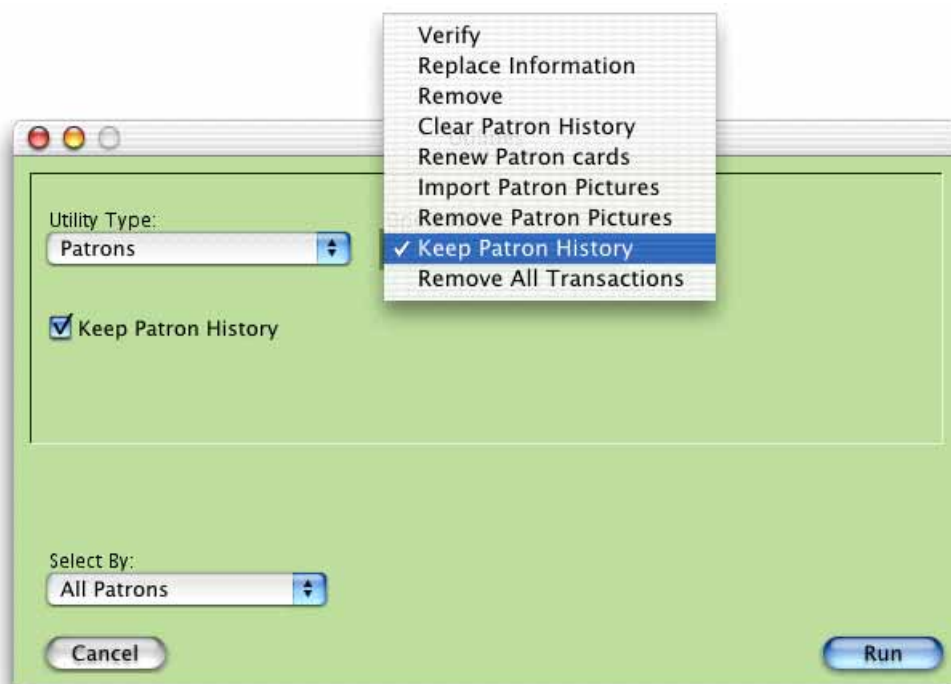
The **Remove Patron Pictures Select By** options are the same as the **Patron Reports Select By** options (see *"Patron Report Select By Options"* on page 395)

- ✓ Items
- Patrons
- Circulation
- Check for Updates
- Database
- Catalog Utilities
- Verify Utilities

- ✓ Verify
- Replace Information
- Remove
- Clear Patron History
- Renew Patron cards
- Import Patron Pictures
- Remove Patron Pictures
- Keep Patron History
- Remove All Transactions

## Patrons: Keep Patron History

Activates or deactivates the **Keep Patron History** checkbox (located in the **Patron Management, Statistics**) for each selected patron (*see page 186 for more information*).



## Keep Patron History Select By Options

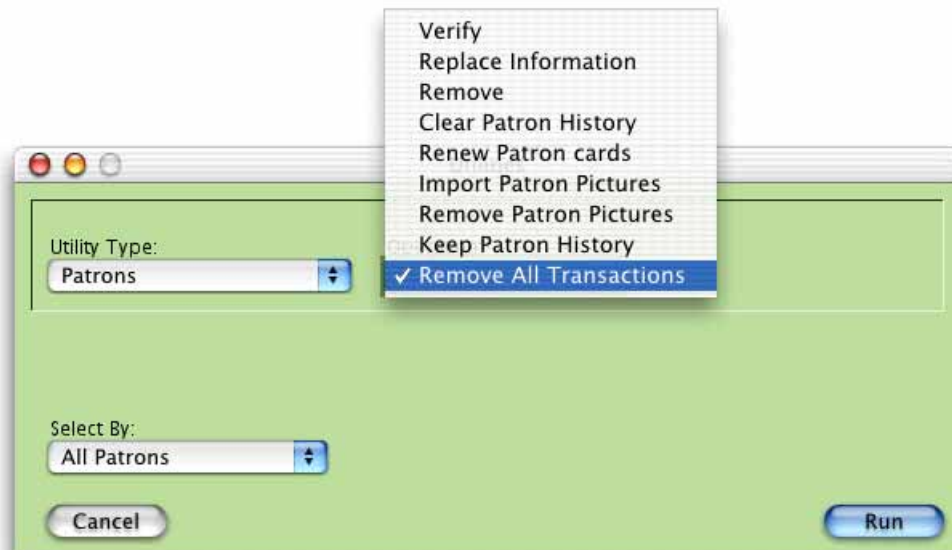
The **Keep Patron History Select By** options are the same as the **Patron Reports Select By** options (*see "Patron Report Select By Options" on page 395*).

- ✓ Items
- Patrons
- Circulation
- Check for Updates
- Database
- Catalog Utilities
- Verify Utilities

- ✓ Verify
- Replace Information
- Remove
- Clear Patron History
- Renew Patron cards
- Import Patron Pictures
- Remove Patron Pictures
- Keep Patron History
- Remove All Transactions

## Patrons: Remove All Transactions

This utility removes all transactions for selected patrons.



### WARNING !

Do not run this utility unless you want to lose **Circulation** details for the selected patrons!

## Remove All Transactions Select By Options

The **Remove All Transactions Select By** options are the same as the **Patron Reports Select By** options (see “Patron Report Select By Options” on page 395)



- ✓ Items
- Patrons
- Circulation
- Check for Updates
- Database
- Catalog Utilities
- Verify Utilities

- ✓ Verify
- Replace Information
- Remove
- Clear Patron History
- Renew Patron cards
- Import Patron Pictures
- Remove Patron Pictures
- Keep Patron History
- Remove All Transactions

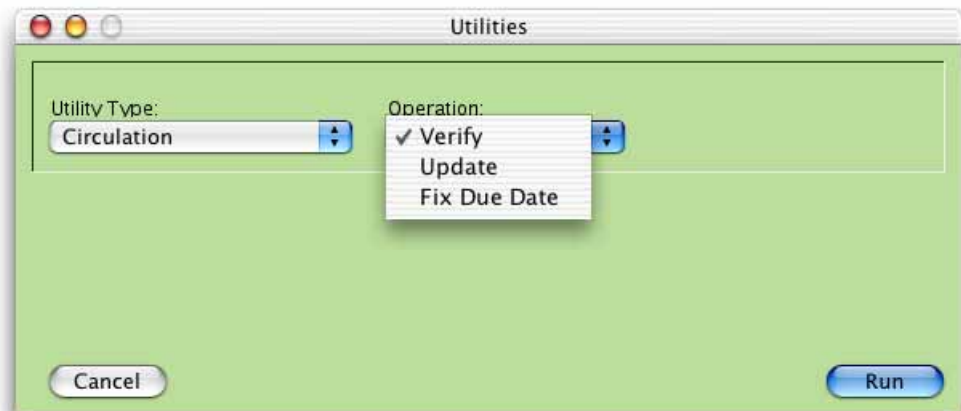
- ✓ Verify
- Update
- Fix Due Date

**NOTE:**

Update will **NOT**  
modify a manual  
(period or hard) due  
date!

## Circulation

Make important changes to your circulation policies or correct batches of incorrect due dates using the **Circulation** utility.



### Circulation Utility Operation Options

**Verify**—Examines all circulation records for internal consistency. Bad circulation records are either fixed or removed, depending on the type of problem detected. This utility does not update circulation records with policy changes.

**Update**—Performs the **Circulation Verify** function for all circulation records, but also updates changes in policies which have occurred since the transaction. Use this utility if you've set new fine rates and want them applied to existing transactions.

Please remember that using the **Update** operation applies policy changes retroactively, meaning you are holding someone responsible for a policy or fine raise they were *not* accountable for at the time.

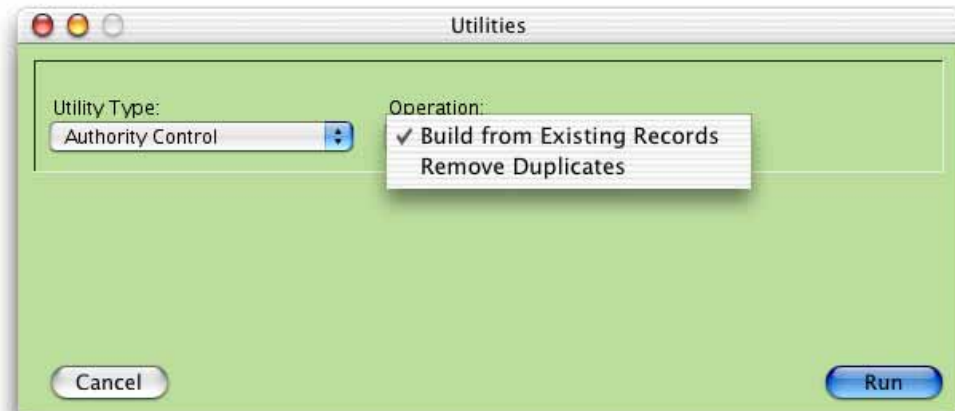
**Fix Due Date**—Allows you to change a selection of incorrect due dates if those dates get entered incorrectly, fall on an unreported holiday, or any other unforeseeable circumstance.

- ✓ Items
- Patrons
- Circulation
- Check for Updates
- Database
- Catalog Utilities
- Verify Utilities

- ✓ Build from Existing Records
- Remove Duplicates

## Authority Control

These utilities help to create and clear your authority control entries.



### Authority Control Utility Operation Options

**Build from Existing**—This utility will create authority-controlled records based off your existing database information. For more information on the procedures of this utility, please review the section that begins on page 223.

**Remove Duplicates**—This utility will reverify all of your current authority-controlled fields and remove any duplicate entries.

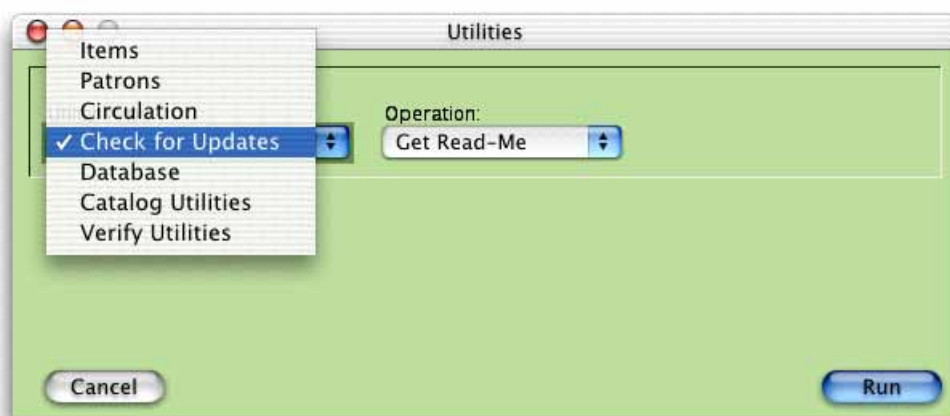
- ✓ Items
- Patrons
- Circulation
- Check for Updates
- Database
- Catalog Utilities
- Verify Utilities

- ✓ Verify
- Replace Information
- Remove
- Clear Patron History
- Renew Patron cards
- Import Patron Pictures
- Remove Patron Pictures
- Keep Patron History
- Remove All Transactions

- ✓ Get Read-Me
- Get Update
- Get NetLink Update
- Get Help Files

## Check for Updates

If you have an internet connection, you can check for Alexandria updates from COMPanion's server. This utility is only available for the Data Station; Librarian Workstations do not offer this selection.



## Check for Updates Operation Options

**Get Read-Me**—If an update is available, a description of the update is displayed.

**Get Update**—If an update is available, you can choose to update your Alexandria Data Station or wait for a future date.

**Get NetLink Update**—If a NetLink update is available, you can choose to update your NetLink records.

**Get Help Files**—Downloads the latest integrated Alexandria Help files (located under the **Circulation, Help** menu).

- ✓ Items
- Patrons
- Circulation
- Check for Updates
- Database
- Catalog Utilities
- Verify Utilities

- ✓ Verify
- Replace Information
- Remove
- Clear Patron History
- Renew Patron cards
- Import Patron Pictures
- Remove Patron Pictures
- Keep Patron History
- Remove All Transactions

## Database: Rebuild

Database utilities allow you to correct problems with the record structures saved on disk. Unlike the **Verify** utility type, these utilities don't look at individual pieces of data—they look at entire records. If you've had a power outage (or other serious problems with your hardware), you may need to run this utility.

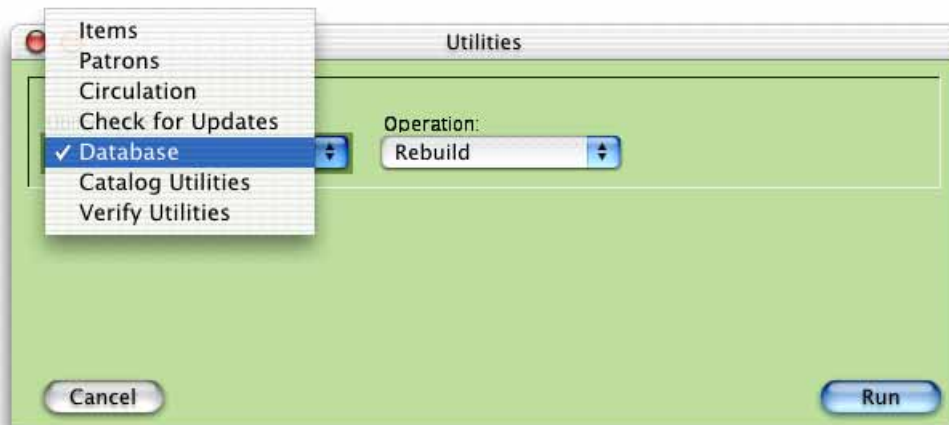
Please keep in mind that the "mini-rebuilds" which occur during the launch of Alexandria after a system failure or during certain upgrades are not the same as this "full" **Rebuild** and do *not* replace the need for running this utility.

The **Rebuild** utility rebuilds all data files and then runs all **Verify (Patrons and Items)** routines. If data damage is detected, it's automatically fixed. Some records may be deleted if they are irreparably damaged. If unrecoverable damage is detected, you'll be notified and will have to restore from a backup before you can continue. Alexandria tries very hard to recover your data. If it can't be done, there is nothing COMPanion can further do to restore the data. Your best protection are frequent backups of your valuable data. Run this utility once a month to keep data in good order.



### NOTE:

UNDER NO  
CIRUMSTANCES should  
you ever do ANYTHING  
during the **Rebuild** utility.



- ✓ Items
- Patrons
- Circulation
- Check for Updates
- Database
- Catalog Utilities
- Verify Utilities

- ✓ Verify
- Replace Information
- Remove
- Clear Patron History
- Renew Patron cards
- Import Patron Pictures
- Remove Patron Pictures
- Keep Patron History
- Remove All Transactions

- ✓ New
- Modify
- Remove
- Switch Tag #

- ✓ Main Author\*
- Secondary Author(s)
- Title
- Subject – Topical
- Subject – General
- Subject – Chronological
- Subject – Geographic
- Notes – Content\*
- Notes – General
- Notes – Summary
- Publisher\*
- Interest Code
- Curriculum Code
- Bibliographic Code
- Series
- Medium\*
- Other

## Catalog Utilities

**Catalog Utilities** allow the user to add **New**, **Modify**, **Switch Tag#**, or **Remove** any information in a MARC record within your collection. Only records in a selected range are examined for modification. When an asterix "\*" appears next to a selection in the **Select Tag\_Subfield** drop-down menu, it means that only one (of the selected) is allowed per item. For example, you can only have *one* **Main Author\*** per title and there can be only one **Medium\*** type.

### WARNING !

Catalog Utilities permanently modify groups of records. If you are unsure (or just want to be safe), perform an **Archive** of your data before you perform this utility. In the event of a huge mistake, you can restore your old data. Be extra careful when you use these routines!

Since Alexandria stores data in a MARC format, making changes involves modifying data in your MARC tags and subfields. The utility allows you to specify a specific subfield, or specify multiple subfields within the same tag.

When checking for data to modify, you can specify wildcard characters for matching purposes. Use the "\*" character to specify any number of characters, and the "?" character to specify a wildcard match for only one (or no) character.

If you specify *only* a tag in the **Tag\_Subfield** area, then you must specify subfields in the other fields.

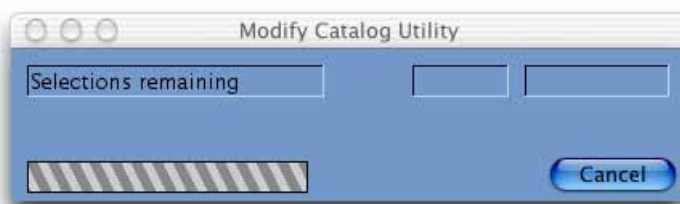
Thus, to remove all subfields in the **260** tag, enter only "260" in the **Tag\_Subfield** field, and in the **Value to Remove** field enter "\_a\*\_b\*\_c\*" The wildcard character, "\*", causes Alexandria to match all values, and since this is a **Remove** operation, it will remove all the specified subfields. When all subfields are removed from a tag, the tag itself is automatically removed. Use "\_?" to specify "any subfield."

Thus, to look for all author listings that begin with Asimov, enter “Asimov\*” as we do in the following example:



In this example, the user wants all author entries for Isaac Asimov to have the same format.

- Step 1. Set the selection to only examine records where the author is Asimov.<sup>1</sup>
- Step 2. Specify that we want to modify only data in **100\_a**.
- Step 3. Just to be sure, check to see that the author begins with “Asimov”.
- Step 4. We replace matching **100\_a**’s with “Asimov, Isaac.”
- Step 5. Click **OK** to change your data.  
Click **Cancel** to abort the utility.



### W A R N I N G !

Changes already performed can not be undone! Only unprocessed records are cancelled. Any record that was modified by the utility will stay modified.

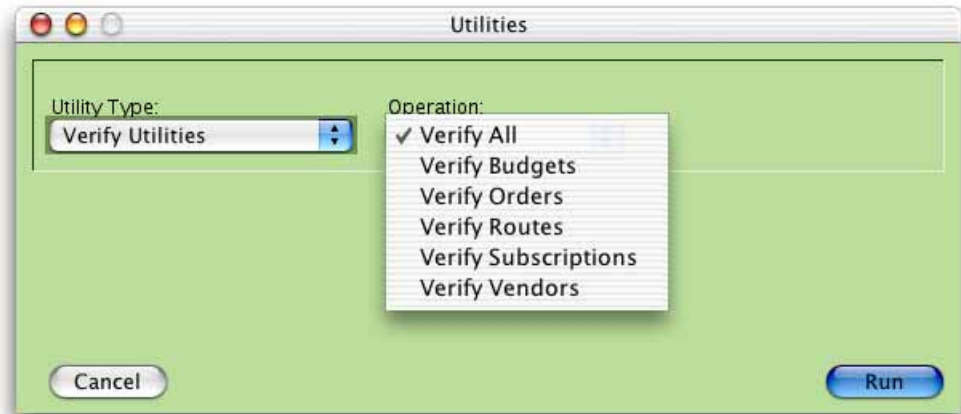
<sup>1</sup> In this example, the utility would also change author *Janet* Asimov’s entries to Isaac. We should have specifically selected the author as “Isaac Asimov”. Use this utility with great care!

- ✓ Items
- Patrons
- Circulation
- Check for Updates
- Database
- Catalog Utilities
- Verify Utilities

- ✓ Verify
- Replace Information
- Remove
- Clear Patron History
- Renew Patron cards
- Import Patron Pictures
- Remove Patron Pictures
- Keep Patron History
- Remove All Transactions

## Verify

**Verify** utilities are used to verify Alexandria data files and that internal relationships are valid and logical. When bad relationships are identified, they are corrected. Verification does not rebuild database structures or indexes.



## Verify Utility Operation Options

**Verify All**—Verifies all data files (including patrons, items and circulation), with one command.

**Verify Budgets**—Examines all budgets, making sure that they are computed correctly and that all statistics are valid.

**Verify Orders**—Examines all orders for accuracy. The system confirms that all related data exists in your system.

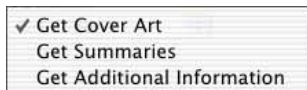
**Verify Routes**—Examines all routes, confirming that the responsible patron exists and that patrons in the route lists exist in your system.

**Verify Subscriptions**—Examines all subscriptions, confirming that related data exists and that internal information is logically consistent.

**Verify Vendors**—Examines all vendors, making sure that vendor statistics are accurate and logical.

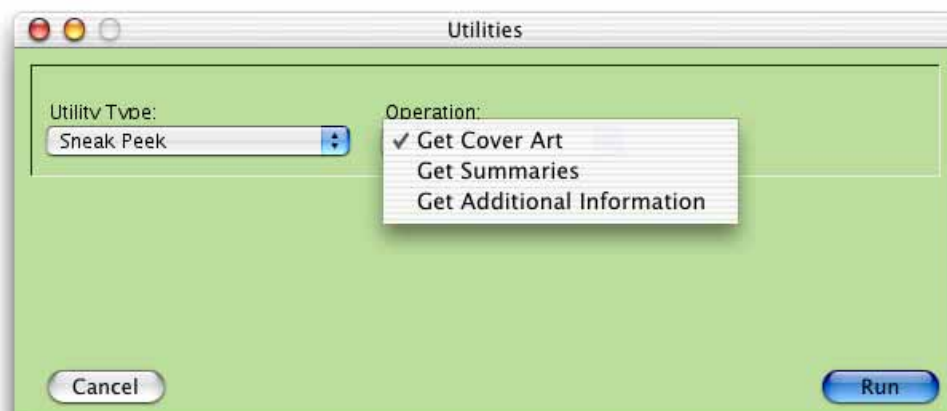


## Sneak Peek



### - N O T E -

These utilities are only become available if you are a registered **Sneak Peek** user.



## Sneak Peek Utility Operation Options

**Get Cover Art**—After recommending that you archive your data, this utility will search Sneak Peek’s on-line resources and attempt to download the cover art for all the items with valid ISBN’s that are contained in your Alexandria database. Item cover art will be shrunk to 100x100 ppi (32 resolution) upon import and stored in your Alexandria database. Item cover art will appear in a plethora of Alexandria areas, including the circulation window.

**Get Summaries**—This utility searches Sneak Peek’s on-line resources and attempts to download item summaries for all the items with valid ISBN’s that are contained in your Alexandria database. These summaries will be stored in the individual item’s 520 tag and can be displayed in the **Item Management** window, **MARC View** window, and also a successful **Search** results window.

**Get Additional Information**—Searches for any additional information about the items in your databases (e.g. first chapter, reviews, etc) and places an internet link to these informational sources in a successful **Search** results window.

# Data Import and Export

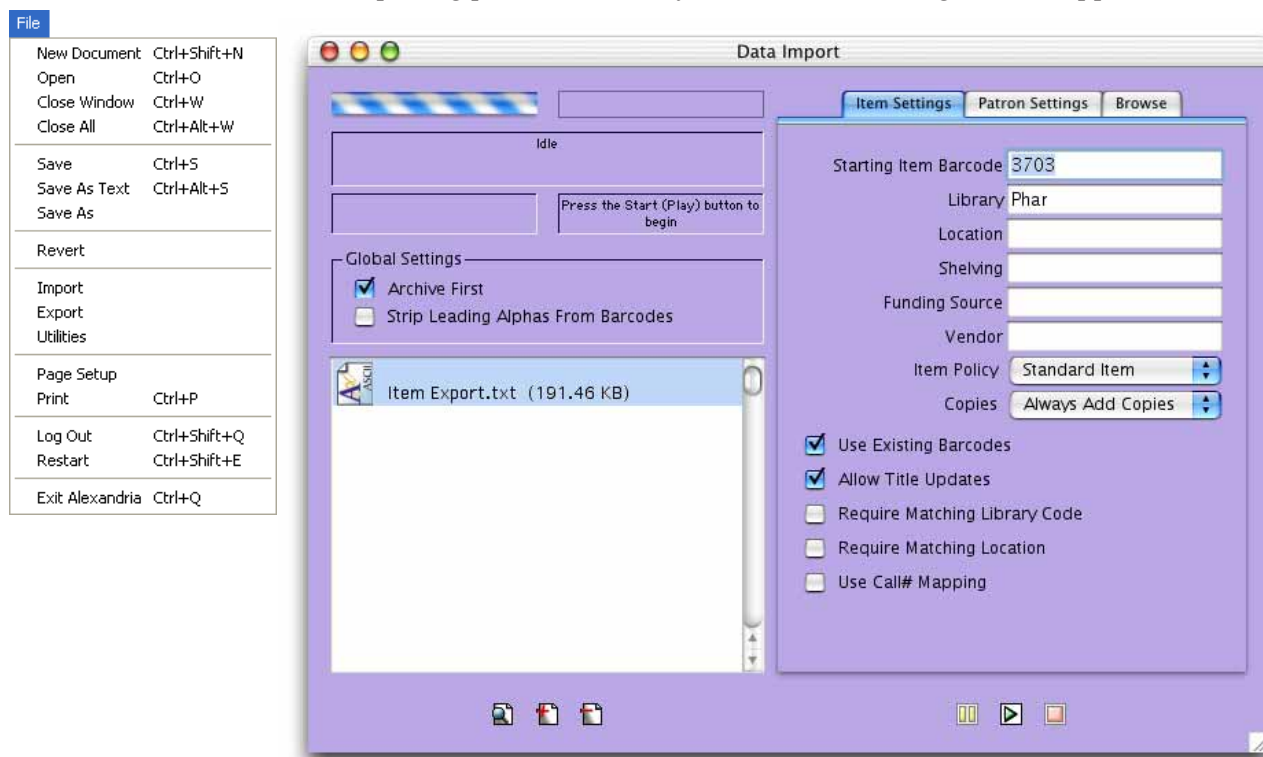
There are times when you'll want to add information into Alexandria from other sources (such as MARC records from a book purchase or patron information from a central database). The process of adding information into Alexandria from other sources is called importing.

Alexandria supports importing of patron, item, and transaction command information.

## The Data Import Window

There are two ways of importing patron or item data into Alexandria. The first is to select **Import** from the **File** menu and then guide Alexandria to the location of your import file. The second way is to drag the import file onto the **Circulation** window.

When importing patrons or items, you'll see the following window appear.



The window above is shown for special format, tab-delimited, MARC and MicroLIF imports. The following pages show you how to set your import preferences.

File	
New Document	Ctrl+Shift+N
Open	Ctrl+O
Close Window	Ctrl+W
Close All	Ctrl+Alt+W
Save	
Save	Ctrl+S
Save As Text	Ctrl+Alt+S
Save As	
Revert	
Import	
Export	
Utilities	
Page Setup	
Print	Ctrl+P
Log Out	
Restart	Ctrl+Shift+E
Exit Alexandria	
	Ctrl+Q

## Global Settings

There are two check boxes available as your **Global Settings**.

**Archive First**—When this option is selected, Alexandria will **Archive** your data before the import is performed. This is useful when bad data is imported and it's necessary to go back to a previous database. Default is **ON**. The archive that is created will be placed in the folder specified in your **Archive Preferences** (see “*Archive Preferences*” on page 99).

**Strip Leading Alphas**—When this option is selected, leading alpha characters on imported barcode are ignored. For example, “XYZ100” would be turned to “100” if this option is **ON**. Default is **OFF**.



On the bottom left-hand side of the **Data Import** window are three buttons directly related to the import file queue field.

**View File**—To view the file before it's imported, highlight it and click on this button. It will open the import file in Alexandria's integrated Virtual Word Processor and allows you to view its contents.

**Add**—Allows you to place more import files in the queue through an operating system standard explorer window. You can also add more files by dragging them into the **File Import List** field, Alexandria program icon, or **Circulation** window.

**Remove**—Highlight an import file and click this button to remove it from the **File Import List** field.

## Item Settings

**Item Settings** determine what changes to make to an item data file on import. During import, if Alexandria detects an item barcode that is less than *three* alphanumeric digits, it will pad the beginning of the barcode with X's. For example, if you are importing an item with the barcode of "7", then Alexandria will automatically import it as "XX7".

**Starting Item Barcode**—If a new item barcode number is required, Alexandria will assign numbers beginning with the value you enter in this field. Alexandria always checks to see if a barcode is already in use, and if it is, a new barcode number is automatically selected. Default is "1300000".

**Library**—If the collection code for the record you're importing isn't specified, this collection value will be placed into the **852\_a** tag. Default is blank.

**Location**—If the location code for the record you're importing isn't specified, this location value will be placed into the **852\_b** tag. Default is blank.

**Shelving**—If the second location code for the record you're importing isn't specified, this location value will be placed into the **852\_c** tag. Default is blank.

**Funding Source**—If the funding code for the record you're importing isn't specified, this location value will be placed into the **852\_1** tag under a specially-formatted subfield. Default is blank.

**Vendor**—If the vendor code for the record you're importing isn't specified, this location value will be placed into the **852\_1** tag under a specially-formatted subfield. Default is blank.

**Item Policy**—If the record you're importing doesn't have an item policy defined, this policy you select from this drop-down menu will be used. Default is **Standard Item**.

**Copies**—Specifies how copies are managed on import. Default is **Always Add Copies**.

**Always Add Copies**—When importing, any copies that exist in the import file are imported to either **Add New Copies** or **Update Existing Copies**. If the title record being imported doesn't contain any copies, then a new default copy is added to the imported title record even if Alexandria already has a matching title that has a copy.

**Never Add Copies**—Copies from imported records is essentially ignored. Only the title information is imported.

**Add Found Copies**—If you're updating titles and a match is made, add or update the copy as appropriate. If you're not updating titles, simply add a new title for every record imported and add all copies that are included in the import record (there is no matching; any barcodes that are duplicates of barcodes that already exist within your Alexandria database will be reassigned).

AV
BIO
CD
E
FIC
MAG
NF
PROF
PTA
REF
✓ Standard Item
System Item
VID

✓ Always Add Copies
Never Add Copies
Add Found Copies

**Use Existing Barcodes**—When this option is selected, barcode numbers found in imported records are used *as is* during import. When this option is unchecked, all item barcodes are reassigned using the **Starting Item Barcode** number (detailed on the previous page). Default is checked.

If you know for sure that your vendor assigned “dummy” barcode numbers with your MARC records, you’ll want to turn this option **Off** to force Alexandria to assign new barcode numbers according to your system preferences.

**Allow Title Updates**—When this option is checked, imported data will update existing titles if specific key fields match. When this option is not checked, only new records are added. Default is checked.

Typically, you’ll want Alexandria to add new copies to existing titles, or use the import function to update brief records. If, however, you want Alexandria to create new title records for each MARC record imported, uncheck this option.

**On**—If the title or copy data is matched, existing title record is modified (whether that means adding copies or updating copy and title info).

**Off**—Existing titles are never modified by import. If a barcode matches another, it is reassigned. Title records are added—copies may (or may not be) added.

**Require Matching Library Code**—When checked, copy data is ignored where the **852\_a** collection code doesn’t match the current collection code specified on the **Library Information** preferences window (see “*Library ID Code*” on page 131). When there is no **852\_a** information, it is assumed to be the local collection code. When unchecked, all copies are imported—no matter what the **852\_a** tag contains. Default setting is unchecked.

**Require Matching Location Code on Import**—When this box is checked, only copy information with your data station’s location code (or no location code) is imported. All other library codes are ignored. Default is OFF.

**Use Call# Matching**—When checked, any call numbers within the call number range specified in your **Item Policies** preference window will be assigned to that particular item policy. See **Item Policies** on page 144 for more information on **Call# Mapping**.

## Patron Settings

**Patron Settings** determine what changes to make to a patron data file on import. During import, if Alexandria detects an item barcode that is less than *three* alphanumeric digits, it will take the **Next Barcode** specified in your **Patron Preferences** (page 139) and assigns that barcode to the patron being imported.



**Starting Patron Barcode**—If a new patron barcode number is required, Alexandria will begin assigning numbers beginning with this value. Alexandria always checks to see if a value is already in use, and if it is, a new number is automatically selected. Default is “1100000”.

✓ Standard Patron  
System Patron

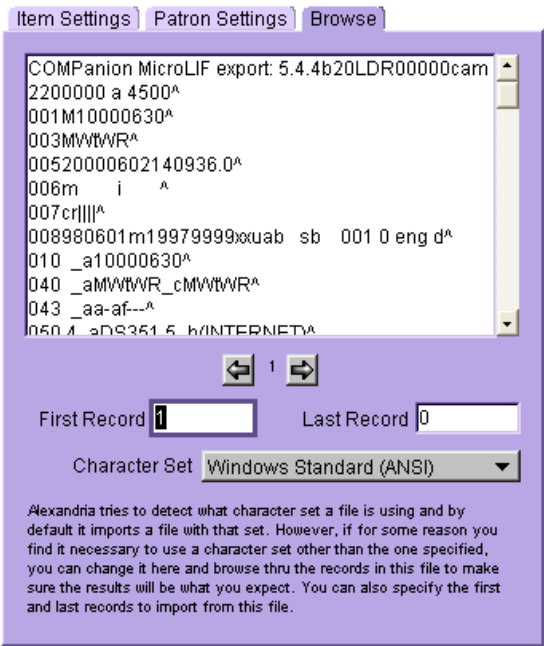
**Patron Policy**—If the patron you’re importing doesn’t have a policy defined in their import file, this policy will be applied as the default. Default is **Standard Patron**.

**Allow Patron Updates**—When this box is checked, imported data is used to update existing patrons if specific key fields match. When this box is not checked, only new records are added. Default is checked.

**Use Existing Barcodes**—When this box is checked, barcode numbers found in imported records are used *as is* during import. When this option is not checked, all barcodes are reassigned using your **Starting Patron Barcode** number. Default is checked.

Browse

**Browse** through the import file, make changes to the character sets, or select a range of records to import.



**First Record**—Allows you to specify the first record to import from this file.

**Last Record**—Allows you to specify the last record to import from this file.

**Character Set**—Alexandria tries to detect what character set a file is using and by default it imports a file with that set. However, if for some reason you find it necessary to use a character set other than the one specified, you can change it here and browse through the records in this file to make sure the results will be what you expect.

- ✓ Mac Standard (ASCII)
- Windows Standard (ANSI)
- MARC-8
- DOS Standard (ASCII)

Diacritics are the little marks or squiggles often found above or below certain letters of the alphabet to indicate special phonetic pronunciation. If you are importing an item or patron file into Alexandria that contains alphanumeric characters with diacritics, they will be correctly preserved upon import.

There are several different ways to insert diacritics when cataloguing; usually determined by your operating system (Windows or Macintosh) and what standard character set you use. More often than not, diacritics can be entered using a series of keyboard commands.



## Importing Data Files

Click the **Start Import** button to begin the import. Use the **Pause Import** button to halt import temporarily. Use the **Cancel Import** button to end the import. During import, status is shown on the top left-hand side of the **Data Import** window.



### W A R N I N G !

#### Importing Statistical Information

Be careful when importing statistical information. The numbers you import (such as **Copies Available** or **January Usage**) will replace the current Alexandria library statistics and could result in loss of information. For example, if the program calculates **25** as the **January Usage**, and you import the number **12**, the system will now show **12** although **25** is correct.

## Computerized Records

Before we go further, it will help to understand some basic concepts about computerized records. In order to exchange information between different programs (or even between different computer systems), one needs to get the information into a format that many different programs can understand. The standard, called ASCII<sup>1</sup>, is widely used to exchange information between different programs and operating systems. Sometimes an ASCII file is called a text file ("\*.txt") because all it contains is textual information.

ASCII files contain two types of characters: *standard visible characters* such as numbers and letters of the alphabet, and *special characters* that are called **Control Characters**.<sup>2</sup> **Control Characters** are used for special purposes to control the display or interpret the information in the file. If you have computerized data, you may be familiar with the <tab> and <return> control characters that are used to make text more legible.

When dealing with computerized information systems, you often hear the terms **field**, **record**, and **file**. A **field** is the smallest unit of information stored. An example of a field is a book's title. A **record** is a related group of fields. Many records of the same type saved together are called a **file**. For example, in a **file** of names, a **record** consists of the **fields** "First Name" and "Last Name". A more complex file may include records with other fields such as "Phone Number" and "Address". In other words, *records* contain *fields* filled with information, and *files* contain many *records*.

In the library world, there is a fairly well-defined method of exchanging bibliographic information between computers. This format is called **MARC** (for **M**ACHINE-**R**eadable **C**ataloguing). Another format of the MARC is called **MicroLIF** (for **M**icrocomputer **L**ibrary **I**nformation **F**ormat). Alexandria has been programmed to recognize both MARC and MicroLIF files automatically during import. Alexandria can also export in both formats.

In addition to importing and exporting MARC and MicroLIF records, Alexandria is capable of importing and exporting files in a **tab-delimited** format. This format can be used to exchange information with other programs that utilize more complex MARC standards. Most database, spreadsheet, and word-processing programs on personal computers support files in a tab-delimited format.

1. American Standard Code for Information Interchange (ASCII)

2. Since **TAB** and **RETURN** characters aren't visible, they are represented in this document as <tab> and <return>.

## Tab-Delimited Records

A very common method of exchanging record information between programs is the tab-delimited ASCII file. In the tab-delimited format, fields are separated by the <tab> control character and the end of the record contains the <return> control character.

```
John <tab> Smith <return>
```

```
Bill <tab> Jones <return>
```

```
My First Name <tab> My Last Name <return>
```

Using tab-delimited patron import files, you can transfer information about patrons stored in other computer systems. For example, a school can use this capability to transfer student information from the school administration computer system into Alexandria (or transfer library information back to the administration system).

## Alexandria's Tab-Delimited Import File Format

In Alexandria, we've enhanced the tab-delimited format by adding special information on the first line of the file, used to interpret the data in the file. This first line is called a header because it's at the head (or beginning) of the file. The header allows programs to figure out where the data in the file belongs. Alexandria headers look like this:

```
###*FileCode/FieldCode/FieldCode/FieldCode/ <return>
```

The ###\* doesn't mean anything, but is a rather unusual character combination, unlikely to be found at the beginning of most files. If Alexandria discovers ###\* at the beginning of a file, it assumes that the file is in a familiar format.

### - N O T E -

The Field Code numbers (shown above) don't have any special meaning other than acting as unique identifiers for each of the fields that can be imported or exported.

The header is optional. If it's present, Alexandria will automatically sort and organize the information and place it into the correct, specified fields. If there is no header, Alexandria displays a window, which allows you to specify the order and type of data getting imported. A header is automatically created for all export files.

Since the header is automatically created on export, the information can be transferred to another copy of Alexandria and automatically imported without the user knowing anything about the file structure. This makes it easy for central administrators to transfer information to Alexandria users. In order to be consistent, Alexandria assumes that the first line of any import file is a header. However, it only knows how to process headers in the format stated above.

Some fields allow multiple lines of information (such as patron notes). Any <return> located in a field is converted into the '\ ' character on export and on import, the '\ ' character is restored to a <return>. Generally, you don't need to know about this; however, if you were to examine an exported file, you'd see these characters. Also, if you wanted to add a <return> into a file that is getting imported, you can use the '\ ' character to make it happen.

## Import File Example

A sample patron import or export file might look like this:

```
###*PT01/1000/1007/1006/ <return>
1100000 <tab> Bill <tab> Smith <return>
1100001 <tab> John <tab> Jones <return>
```

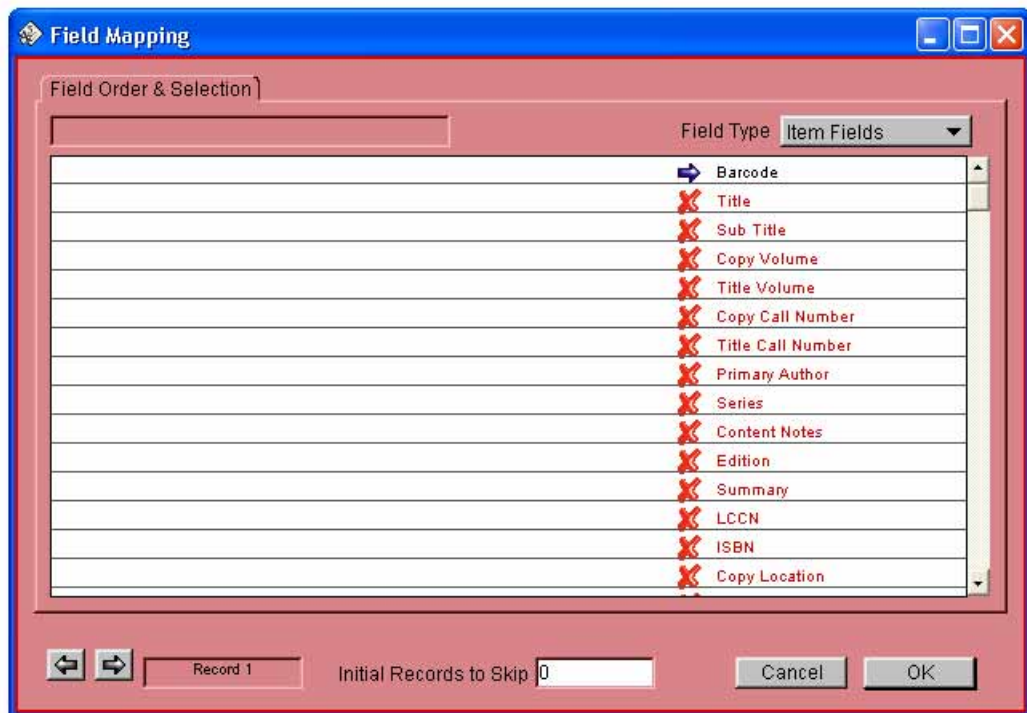
In the example above, the header field codes “1000, 1007, 1006” specify that the fields are ordered by barcode, first name, and last name. An item record will be in a similar format, except that different field codes are used and different types of field information are entered (e.g. title or author of the item).

A simple way to study these formats is to export a few records, then examine the export file with Alexandria’s virtual word processor.

If you export from Microsoft Works, you’ll notice that Works also places a header at the beginning of its files. The header contains the titles of the columns in the file you’ve exported. If you want, you can open your export file with Works and replace the Works header with a valid Alexandria header. If you don’t do this manually, you’ll have to make sure you select the correct fields in the **Field Mapping** window in Alexandria.

## Field Mapping Window

When there is no header on a tab-delimited file, the **Field Mapping** window appears so that the user can specify which data in the import file goes into what Alexandria field.



Use the **Field Type** drop-down menu to specify **Patron** or **Item** fields. The data from the import file is shown on the left of the window. Alexandria field names are shown on the right-hand side.

Use the arrow buttons on the bottom left of the window to examine different records in the import file. If you want to skip some of the records in the import file, you can specify an **Initial records to skip** value. Default is "zero".

To adjust the order of the Alexandria fields, highlight and drag the field names. Put the Alexandria field names in the correct order for your imported data. To skip a field, double click on its line and the arrow will change to a big, red X. This means the data for this field is ignored and will NOT be imported.

Once the field order has been established, click the **OK** button to import the data. Click **Cancel** to stop importing.

Special note should be made of the **Full Name** field during **Patron** data import. If you have a patron with a combined first and last name (one that has not been separated by tab delimitation), use this field to split the name into **First** and **Last Name** on import.

## Importing Patron Information

Importing is the process of moving information into Alexandria from outside sources. Typically, this is a quick and easy method to getting information into Alexandria, rather than entering it manually.

Using Alexandria's import function, you can move patron information from other computer applications directly into Alexandria. For example, you might be able to get patron information from the administrative office student database and import it into Alexandria. When students graduate from elementary to middle school, you can provide patron records that the middle school can import into its Alexandria system.

Alexandria can import patron information files in tab-delimited format. Most word-processing and spreadsheet applications support files in tab-delimited format.

## Rules for Importing Patron Information

When importing patron records, Alexandria first checks if barcode numbers and ID numbers are being imported. If they are, Alexandria makes sure these numbers are unique and not already in use by another patron.

- Alexandria looks for a header that contains a file designation of "PT01"<sup>1</sup> to specify patron information.  
`###*PT01/fieldcode/fieldcode.../ <return>`
- During import, Alexandria attempts to locate an existing record that matches the newly imported record. If an existing Alexandria record is located (and **Allow Patron Updates** is selected), the existing record is updated with the imported information. If **Allow Patron Updates** is unchecked, the matching import records are ignored. If no records in the system match, a new record is added.
- In looking for matching records, Alexandria first checks the patron barcode, then the community ID, and government ID. If no matches exist, the import record is considered a new record. New records are assigned barcodes and policies based on the preferences you've entered in the Import window.
- Alexandria 5.4.4 supports Alexandria v3 patron headers for compatibility with older data transfer systems.

## Uses for Patron Import and Export

The patron import/export routine allows the library to share patron information with other computer systems. A city library can get a list of residents from the local utility company, or a school library can get a list of patrons from the school administration system. Thus, library patron information can be transferred from Alexandria to other programs. For example, a school may hold a final report card if the student owes fines to the library. By giving fine information to the school administration program, others may benefit.

Another use for export/import is to modify information in a group of records. Patron information can be exported, opened in another computer program, modified, then returned to Alexandria. Sometimes this is much easier than modifying records (one at a time) in Alexandria.

---

1. The file designator consists of two letters followed by two numbers. The letter will never be an "O" so you can be sure that "0" means zero.

## Patron Fields—Field Number

Barcode—1000  
Community ID Code—1001  
Government ID Code—1002  
Password—1003  
Location—1004  
Secondary Location—1005  
Last Name—1006  
First Name—1007  
Middle Initial—1008  
Name Index—1009 {export value only}  
Level—1010  
Address—1011  
City—1012  
State or Province—1013  
Postal Code—1014  
Country—1016  
Phone Number—1017  
Fax Number—1018  
Email—1019  
Contact Notes—1020  
Librarian Notes—1021  
Alert Notes—1022  
Categories—1025 {separate category terms with \}  
Status—1026 {1=Active, 2=Card Lost, 3=Usage Blocked, 4=Transferred, 5=Inactive, 6=Other}  
Library Code—1027 {for multi collection databases}  
Policy—1028 {Use policy short code}  
Previous Policy—1029 {Use policy short code}  
Current Fine Balance—1030 {export only}  
Fine Payments—1031 {export only}  
Sex—1032 {Unknown=0 or U, Male=1 or M, Female=2 or F}  
Life to Date Usage Count—1033 {export only}  
Number of items currently checked out—1034 {export only}  
Life-to-Date Overdue count—1035 {export only}  
Number of items currently overdue—1036 {export only}  
Number of items currently on hold—1037 {export only}  
Current Reservations Count—1038 {export only}  
In-stock Holds Count—1039 {export only}  
Reserves Count—1040 {export only}  
Keep Patron History—1041 {Yes or No}  
Last Use Date—1042 {export only}  
Last Validation Date—1043 {export only}  
Next Validation Date—1044 {export only}  
Date of Birth—1045  
Patron Accession Date—1046  
Card Expiration Date—1047  
Graduation Date—1048  
Patron RSN—1099 {export only}

## Importing Item Information

Importing is the process of moving information into Alexandria from another source. This is a quick and easy method to get information into Alexandria.

Using Alexandria's import function, you can move item information from other computer applications directly into Alexandria. For example, you might receive item information from vendors and want to import it into Alexandria. If you move library items from one collection to another, you can provide an item record that the new location can import into its Alexandria system.

Alexandria can import item information in industry-standard MARC or MicroLIF format (also in tab-delimited format). Most word-processing or spreadsheet applications support files in tab-delimited format.

## Rules for Importing Item Information

When importing item records, Alexandria first determines if the item is a new record or an existing record that needs updating.

- Alexandria looks for a header that contains a file designation of "FT01"<sup>1</sup> to specify item information.  
###\*FT01/fieldcode/fieldcode.../ <return>
- During import, Alexandria attempts to locate an existing record that matches the newly imported record. If an existing record is located (and **Allow Title Updates** is selected), the existing Alexandria is updated using the imported information. If **Allow Title Updates** is unchecked, matching records from the import file are ignored. If no records in the system match, a new record is added.
- In looking for matching records, Alexandria first checks the copy barcode, then the ISBN, and LCCN. If Alexandria finds an *exact* match for the barcode, ISBN, or LCCN, then the matching record is updated. If the previous check fails, Alexandria then checks for matching title, author, medium, and call number. Publication year, publisher, extent and volume—if a matching record is located, it's updated.
- For updated records, if the imported record is MicroLIF or MARC and doesn't contain copy information, a new copy is added to the updated record if **Always Add Copies** is selected for **Item Import Settings**.

Alexandria performs an analysis on each and every MARC record imported so that information is correctly imported from a wide number of vendors. If you find records that don't import correctly, send them to COMPAnion and we'll reprogram Alexandria to properly import them.

Alexandria correctly imports records from the following sources:

1987 MicroLIF  
1991 MicroLIF  
US MARC Communication & MARC 21  
SunLink, WisCAT  
Laser Cat  
Dynix, Follett  
Canadian MARC  
...and many others since the printing of this document.

---

1. The file designator consists of two letters followed by two numbers. The letter will never be an "O" so you can be sure that "0" means zero.



## Item fields—Field Numbers

Copy Barcode—2000 {852\_p}  
 Copy Last Date Used—2001 {export only}  
 Copy Checked Out Count—2002 {export only}  
 Copy Days in Circulation—2003 {export only}  
 Copy Last Modified Date—2004 {export only}  
 Prior Patron Barcode—2005 {export only}  
 Previous Prior Barcode—2006 {export only}  
 Before Previous Prior Barcode—2007 {export only}  
 Inventory Date—2008 {852\_1}  
 Accession Date—2009 {852\_1}  
 Vendor Code—2016 {852\_1}  
 Copy Condition—2017 {852\_1}  
 Copy Number—2021 {852\_t}  
 Replacement Cost—2011  
 Purchase Cost—2012 {852\_9}  
 Current Policy short code—2013  
 Previous Policy short code—2014 {export only}  
 Copy Status—2015 {export only}  
 Copy Notes—2018 {852\_x}  
 Copy Alert—2019 {852\_z}  
 Funding Source—2022  
 Copy Collection—2023 {852\_a}  
 Copy Location—2024 {852\_b}  
 Copy Call Number—2025 {852\_h}  
 Copy Volume—2026 {852\_v}  
 LCCN—2010 {010\_a}  
 ISBN—2020 {020\_a}  
 Primary Author—2100 {from 100\_a}  
 Full Title—2240 {Title: Subtitle—export only}  
 Title—2245 {245\_a}  
 Subtitle—2246 {245\_b}  
 Statement of Responsibility—2247 {245\_c}  
 Medium—2248 {245\_h}  
 Edition Statement—2250 {250\_a}  
 Publication Place—2260 {260\_a}  
 Publisher—2261 {260\_b}  
 Publication Year—2262 {260\_c}  
 Extent— 2300 {full description—export only}  
 Physical Description—2301 {300\_a}  
 Other Physical Details—2302 {300\_b}  
 Dimensions—2303 {300\_c}  
 Accompanying Material—2304 {300\_e}  
 Series Statement—2440 {440\_a}  
 General Note—2500 {500\_a}  
 Summary—2520 {520\_a}  
 Target Audience Note—2521 {521\_a}  
 Review Source—2522 {521\_b}  
 First Subject—2651 {650\_a--650\_x--650\_y--650\_z}  
 Second Subject—2652 {650\_a--650\_x--650\_y--650\_z}  
 Third Subject—2653 {650\_a--650\_x--650\_y--650\_z}  
 Fourth Subject—2654 {650\_a--650\_x--650\_y--650\_z}  
 Fifth Subject—2655 {650\_a--650\_x--650\_y--650\_z}  
 Bibliographic Codes—2040 {separated by \}  
 Curriculum Codes—2041 {separate by \}  
 Don't Show in Alexandria Researcher—2042 {yes or no}  
 Copy Count—2043 {export only}  
 Available for check out—2044 {export only}  
 Title Life-to-Date Usage Count—2045 {export only}  
 SmartMARC Matching Score—2046 {export only}  
 Title Accession Date—2047 {export only}

First Used Date—2048 {export only}  
Last Used Date—2049 {export only}  
Last Modified Date—2050 {export only}  
Last Modified User ID—2051 {export only}  
Study Program Name—2750  
Study Program Interest—Code 271  
Study Program Reading Level—2752  
Study Program Point Count—2753  
Study Program Test Number—2754  
Study Program Holding Code—2755  
Last Validation Date—2054 {export only}  
Title RSN—2099 {export only}

## Importing Transaction Files

Transaction files are used to enter transactions using text files rather than typing them in manually. Portable barcode readers create transaction files for import into Alexandria. Transaction files can be imported by dropping them onto the **Circulation** window if they have a recognized header. Alternatively, the user can use the **Read Transaction File** transaction command (see *“Importing Portable Laser Scanner Inventory Files”* on page 262).

To automatically recognize a transaction file, Alexandria looks for these headers:

**Palm Laser scanner**—Header begins with: ### SmartScan...

**Heavy Duty Light pen**—Header begins with: ### VidexDownload...

**Heavy Duty (Rugged) Laser Scanner**—Header begins with: ###VIDEX-LL...

When Alexandria is asked to import files with these headers, it will think it's a transaction file and start processing the contents as transactions.



# MARC/MicroLIF Records

Alexandria can read and write MARC or MicroLIF records. Alexandria will automatically recognize which type of record you are reading. Therefore, you don't have to worry about the format of the bibliographic data you receive.

## What Are MARC & MicroLIF Records?

MARC (**MA**chine-**R**eadable **C**atalogue) records are designed for computers to communicate with each other. For the casual users, these records are difficult to read. Even if you have the proper training, they can be hard to decipher. Most users/patrons of your library won't know what a MARC record is, let alone know how to read one. Alexandria takes the information in the MARC record and converts it for "human" usage within the program. Alexandria can save a copy of the MARC record for transfer to other computer users. The format that Alexandria displays is called MicroLIF.

MicroLIF (**M**icrocomputer **L**ibrary **I**nformation **F**ormat) records can contain the same information as MARC records, but they are much easier for you to read. There are some examples of this at the end of this chapter.

## Saving MARC/MicroLIF Records

Although the MARC/MicroLIF formats are industry standards, the type and location of some information located within the MARC record varies from vendor to vendor. In order to be compatible with as many different vendors as possible, Alexandria automatically analyzes the MARC record in order to extract the information required for your library.

## Conversion Rules

During import, Alexandria takes an entire MARC record into memory and then searches for matching information to use with Alexandria. Some vendors place information for multiple copies of an item within the same MARC record. Alexandria will locate the information pertinent for each copy, as long as the information is in a format that Alexandria recognizes.

During import, Alexandria will automatically match existing items with new items. First, if a barcode matches, Alexandria replaces old title and copy information. Second, if the ISBN and title match, Alexandria replaces the old title with the new information. Third, if the LCCN and title match, Alexandria replaces the old title with the new information. Fourth, if all previous options fail, Alexandria matches a title, author, publisher, publication, date, medium, extent, and edition. When a match is detected, information in the imported record is used to update the existing record. The assumption is that newer records contain more accurate information.

Note that if you import new information, then any information you may have modified in existing records is lost. For example, let us say you have a title and you add some title notes of your own. Then, you get a MARC record for that title and import it. If that MARC record includes a series statement, then that series statement will replace the one you have entered. As with *all* imported data, blank data *never* replaces existing data, therefore, if the imported record had no series statement, your data would not be disturbed.

If the input file contains records that do not conform to the published standards for that format, the record will be skipped. Alexandria utilizes a sophisticated system that attempts to decode incoming records, even when they don't conform to the published

standards. If you find records that don't work with Alexandria, please send copies of them to COMPanion and we will update our engine to correctly interpret the non-standard records.

## Conversion Help

If you have any problems with your data, send COMPanion a diskette with your sample MARC or MicroLIF data, a note with the nature of your problem, and the source of the records. We will work with the supplier of your data to ensure compatibility with Alexandria and report our findings to you directly.

## A Shortcut

If your import files are named something similar to: MARC001, MARC002, MARC003 (i.e. they end in three digits), then Alexandria will automatically continue reading additional files. That is, once MARC001 is read, Alexandria will continue with MARC002 and so on. This trick works for MARC, MicroLIF and custom import formats. Using this trick, you can read up to 100 files with one import command.

## MARC/MicroLIF Record Definition

### For MARC records created by Alexandria

When you type bibliographic information into Alexandria, it automatically creates a MARC record based upon the information you enter.

A MARC header is created.

The LCCN is placed into subfield 010\_a

The ISBN is placed into subfield 020\_a

The word "Alexandria" is placed into 040\_u to identify this as a record exported from Alexandria. The version of Alexandria is placed in 040\_v. This coding allows Alexandria to correctly recognize Alexandria proprietary MARC extensions without interfering with non-Alexandria systems.

The Author is placed into subfield 100\_a

The Title is placed into subfield 245\_a, Subtitle in 245\_b, Statement of Responsibility in 245\_c and the Medium in 245\_h.

The Edition is placed into subfield 250\_a

The Place is placed into subfield 260\_a

The Publisher is placed into subfield 260\_b

The Publication Year is placed into subfield 260\_c

The Extent is placed into subfield 300\_a—if AACR2 punctuation is used, it's parsed into the correct Tag 300 subfields.

The Series is placed into subfield 440\_a

The Content Notes are placed into subfield 505\_a

The Summary is placed into subfield 520\_a

The Title Call Number is placed into subfield 900\_a

The Volume is placed into subfield 092\_v.

Bibliographic Codes are not exported.

Curriculum Codes are not exported.

Interest Codes are placed into 521\_a.

Alexandria Statistics are currently not included in the MARC export.

Only URL Attachments are currently included in the MARC exported (856\_u).

If a Title has copies, Alexandria will create a MARC standard 852 tag for each copy.

The Library ID code is placed into subfield 852\_a.

The Copy Location is placed into subfield 852\_b.

The Copy Call Number is placed into subfield 852\_h.

The Copy Barcode Number is placed into subfield 852\_p.

The Copy Condition is placed into subfield 852\_q.

The Copy Alert Note is placed into subfield 852\_z.

The Copy Number is placed into subfield 852\_t.

The Copy Volume is placed into subfield 852\_v.

The Copy Note is placed into subfield 852\_x.

The Copy Cost is placed into subfield 852\_9.

Propriety Copy Information for which the US MARC Corporation has not assigned a MARC tag is stored in the 852\_1. This tag requires special formatting. For example:

The Copy Funding Source is placed into subfield 852\_1 Funds: (funds).

The Copy Accession Date is placed into subfield 852\_1 Accession Date: (date).

The Copy Inventory Date is placed into subfield 852\_1 Inventory (inventory date).

The Copy Policy Code is placed into subfield 852\_1 Policy: (policy code).

The Copy Condition Code is placed into subfield 852\_1 Condition: (condition code).

## A Sample MARC Record

Note how difficult it is to read MARC formatted records:

```
00826cam 2200217 a
450000800390000000100013000390200015000520400025000670500025000920820010001171
00002200127245008600149260003200235300003100267520013300298650001300431650002
000444650002400464852010600488900001400594-870120s1987 nyua j 00010 eng-
a87000565- -a0396089259- -aCCSM5.0.3-cCCSM5.0.3- -aPZ 8.1.B755-bGo 1987- 219-aE-
-aBrett, Jan-d1949-- 0-aGoldilocks and the three bears-cretold and illustrated by Jan
Brett-dBook-h[book]- -aNew York-bDodd, Mead-cc1987- -a[32] p.-bcol. ill.-c29 cm.- -
aLost in the woods, a tired and hungry girl finds the house of the three bears where she
helps herself to food and goes to sleep.- aFolklore- -aBears-xFolklore- -xJuvenile
literature- -aCDL-h398.2 BRE-p3083t1-90.001Accession:02/03/2000|Inventory:02/03/
2000|Policy:Nf|Condition:Unknown|- a398.2 BRE-
```

## A Sample MicroLIF Record

It is much easier to read this MicroLIF formatted record than the equivalent MARC record:

```
LDR00000cam 2200000 a 4500^
008870120s1987 nyua j 00010 eng^
010 _a87000565^
020 _a0396089259^
040 _aCCSM5.0.3_cCCSM5.0.3^
050 _aPZ 8.1.B755_bGo 1987^
082 _219_aE^
100 _aBrett, Jan_d1949-^
245 0_aGoldilocks and the three bears_cretold and illustrated by Jan
Brett_dBook_h[book]^
260 _aNew York_bDodd, Mead_cc1987^
300 _a[32] p._bcol. ill._c29 cm.^
520 _aLost in the woods, a tired and hungry girl finds the house of the three bears
where she helps herself to food and goes to sleep.^
650 _aFolklore^
650 _aBears_xFolklore^
650 _xJuvenile literature^
852 _aCDL_h398.2 BRE_p3083_t1_90.00_1Accession:02/03/2000|Inventory:02/03/
2000|Policy:Nf|Condition:Unknown|^
900 _a398.2 BRE^
991 _aNon Fiction^`
```



## District Librarian

If you've purchased the **District Librarian** license, you'll benefit from some additional capabilities for your Alexandria Data Stations. The **District Librarian Workstation** has all the features of a **Single User** Alexandria license *plus* the ability to access and modify any Data Station in the District Address Book.

### - N O T E -

The District Librarian capabilities are an optional feature of Alexandria. You must purchase a separate license to use this feature.

The District Librarian is installed similar to an Alexandria Data Station, with several slight differences.

- The installer is called **District Librarian Installer**.
- The program is called **Alexandria District Librarian**.
- You'll need separate **District Librarian** registration codes.
- The District Librarian program creates an empty data folder during startup. This data folder can be used to store local District Librarian data, however, most of the time the program will be connected to a remote Data Station as if it were a Librarian Workstation for that Data Station.

The District Librarian works exactly like an Alexandria Data Station, with the following differences.

- A new **District Address Book** selection appears in the **Administration Preference Address Books** window (see "*Configuring the District Librarian*" on page 517).
- A new **District** menu item appears in the **Circulation** window menu bar.



## Using the District Menu

The **District** menu allows the user to choose which Data Station they would like to connect to. When the District Librarian is connected to a Data Station, it operates *exactly* like a Librarian Workstation installed for that Data Station.

### - N O T E -

In order to use the **District** menu, you must be logged into the District Librarian at the **Administrator** password level.

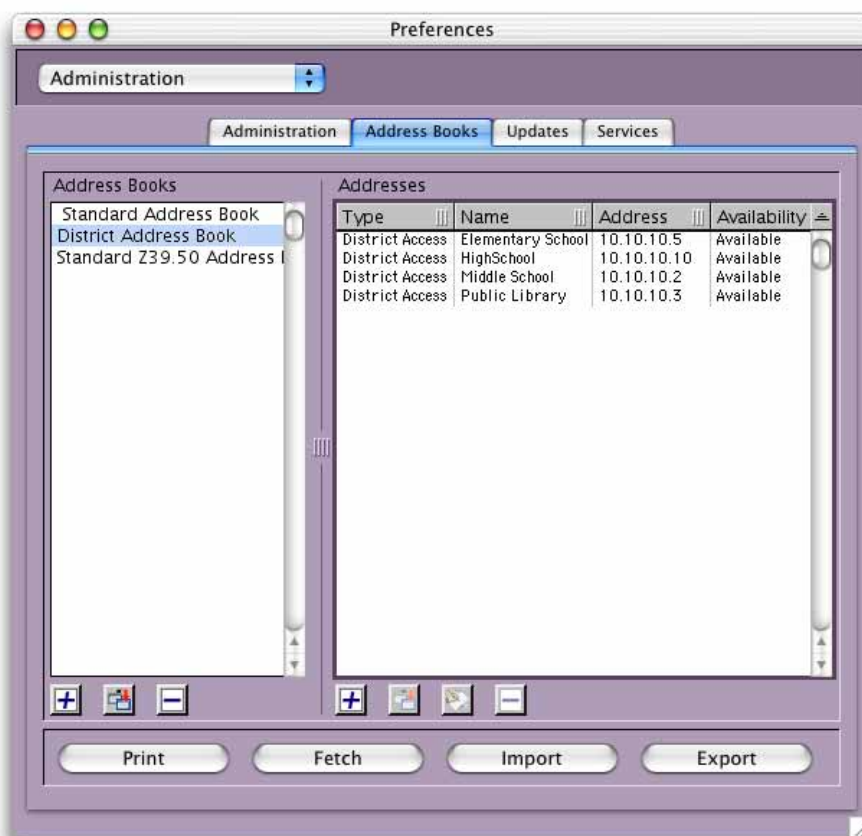
When you change Data Stations with the **District** menu, you may have to identify yourself by entering a **User Name** and **Password**. Make sure you're configured as an **Administrator** or **District Librarian** on all the systems you'll be accessing.

- When the **District Librarian** has **Local** selected, the program works exactly like a single user Alexandria license.
- To move between collections, go to the **District** menu and select the collection and/or location to connect with.
- You may be requested to give a username and password in order to connect to a Data Station. You must have a valid username and password on the remote Data Station. When adding your name to the user list, be sure to select **District Librarian** as your level status. Try to use the same password and same username to make logging onto the **District Librarian** program easier.



## Configuring the District Librarian

Before you can use District Librarian to examine or control other library Data Stations, you'll need to configure the **District Address Book** under the **Address Books** tab of the **Administration Preference** window.



- Step 1. Select **Preferences** from the **Edit** menu.
- Step 2. Click on the **Address Books** tab of the **Administration** preference window.
- Step 3. For each Data Station that you want to connect to, you will have to manually add it by clicking on the **Add** ("+") button at the bottom of the **Administration** window. A window will appear similar to the one below.



- Step 4. From the **Address Type** drop-down menu, select **District Librarian**.
- Step 5. Set your District Librarian's **Availability** to **Available**, **Hide on Researcher**, or **Hide Everywhere**.
- Step 6. Enter the **Friendly Name** of the Data Station you want to add. The **Friendly Name** is the name you will see in the new **District** menu; it doesn't have to match the name of the controlling library.
- Step 7. Enter the **IP Address** of the Data Station you want to add. If you are not sure what IP address your Data Station uses, it appears on your Data Station's **Transaction log** each time Alexandria is launched. It is located approximately three lines down and will display **TCP Is Active, IP address is: [your IP address here]**.

Welcome to Alexandria Data Station 5.4.4
Version Number - 5.4.4
TCP is Active, IP address is: 209.210.70.4
Web services activated.
Kid's Catalog services activated.
Z39.50 server services activated.
Registered for NetLink Updates

If you have problems locating your IP address, please contact your network administrator for further assistance. If your network administrator is not available, feel free to contact the COMPanion Technical Support team.

- Step 8. Enter the name of the controlling **Library** (optional).
- Step 9. Enter an optional **Authentication Code**. The **Authentication Code** is an added level of security for Alexandria users. If you only want a specific handful of Data Stations connecting to your library IP address, you can create an **Authentication Code** and distribute it only to the Data Stations for whom you allow access. You may change and redistribute this **Authentication Code** at any time.
- Step 10. Enter an optional **Username** and **Password** for your Data Station. If **Passwords and Security** in the **Administration** preference window is checked, then users will need to enter a specified username and password to connect to your location and/or collection.
- Step 11. The **Keep window open after adding** checkbox allows you to keep the window open after each new address is configured. When you are finished, click on the **Cancel** button or close the window.

## Technical Details

Alexandria v5 contains several advanced technologies. Although it's not necessary to understand how Alexandria does what it does, this chapter is for the technical person who wants to know more about the inner workings of Alexandria.

### Alexandria v5 is Unique

Alexandria v5 is built on top of a proprietary cross platform (Windows and Macintosh) development system developed specifically for Alexandria. The core components of this system consist of these unique technologies:

- A prioritized multi-threaded scheduling system that schedules and manages all the executable components of the program. All processes within Alexandria are prioritized and queued automatically by our scheduler.
- A powerful communications system that supports TCP/IP communications protocols and addressing. This system can handle thousands of simultaneous messages. All messages are encrypted for communications confidentiality. Only authorized messages are processed by the system.
- An integrated Web Server provides many Researcher options via standard Web browsers across all platforms that support Web protocols.
- A powerful relational database optimized for storing and accessing library information. Saved data is encrypted for added data security. The database is very high performance—on a high end G3 processor with a quick disk drive, it can fully catalog up to 15 MARC records per second.
- A powerful word processor that uses its own virtual memory manager to support very large documents with a small amount of physical memory. Documents can be freely moved between supported platforms.
- A “class library” for developing cross-platform human interfaces.
- A proprietary toolbox of code used by all subsystems.
- Integrated debugging tools. Integrated diagnostic and debugging systems are used throughout all our tools.
- A fully distributed transaction-based client/server architecture. The server (Data Station) processes requests from all clients. Only information necessary for processing is moved between clients and the data station. This places very low demands on already overloaded wide-area networks.

**How do the workstations communicate with the Data Station?**

When the Data Station creates installer folders, the TCP/IP address of the Data Station is saved inside that folder. When the installer creates a workstation, this same addressing information is placed inside the workstation application. This addressing information is saved in an encrypted format that can only be read by Alexandria.

**What happens if the Data Station's address changes?**

If the address of the Data Station is changed, none of the workstations will be able to communicate with it and all workstations will have to be installed again. To force the Data Station to build new installers, quit the Data Station, remove the installer folders and restart the Data Station. New installers are automatically created.

**Can I move my VWP (Alexandria Word Processor) documents to other word-processing programs?**

Yes, the VWP has a **Save As Text** option. However, you'll lose all document formatting.

**Can I move my other word-processing documents into Alexandria's Word Processor?**

Yes, with your other word processor, use the **Save as Text** option. VWP can open TEXT documents. However, you'll lose all document formatting.

# Shortcut Keys

## Accelerator and Hotkey Commands

**Hotkeys**—Hotkeys are the underlined characters in a menu item or dialogue box that allow users to access the item or control by pressing that character's key on the keyboard. In the case of dialogue controls, the user may have to hold down the <alt> key before pressing the hotkey. Hotkeys are sometimes referred to as *shortcut* keys, *access* keys, or *mnemonic* keys.

## Windows Shortcut Keys

Ctrl+Shift+N	<u>N</u> ew Document
Ctrl+O	<u>O</u> pen
Ctrl+W	Close <u>W</u> indow
Ctrl+Alt+W	Close All
Ctrl+S	<u>S</u> ave
Ctrl+Shift+S	Save As Text
Ctrl+P	<u>P</u> rint
Ctrl+Shift+E	Restart
Ctrl+Q	<u>E</u> xit Alexandria
Ctrl+Z	Undo
Ctrl+Shift+Z	Redo
Ctrl+X	<u>C</u> ut
Ctrl+C	<u>C</u> opy
Ctrl+V	<u>P</u> aste
Ctrl+A	Select <u>A</u> ll
Ctrl+F	<u>F</u> ind
Ctrl+G	Find Again
Ctrl+;	P <u>r</u> eferences
Ctrl+L	Patrons
Ctrl+I	Items
Ctrl+T	Circulation
Ctrl+C	Search



**Accelerator keys**—An accelerator key is a keyboard shortcut that is accessed by holding down modifier keys (<shift>, <ctrl>, <alt>, or combinations of these) and pressing another key on the keyboard. Accelerator shortcuts appear to the right of a menu item text.

## Macintosh Shortcut Keys

⌘+H	Hide Alexandria (Carbon)
⌘+⌘+H	Hide Others (Carbon)
⌘+⌘+N	New Document
⌘+O	Open
⌘+W	Close Window
⌘+⌘+W	Close All
⌘+S	Save
⌘+⌘+S	Save As Text
⌘+P	Print
⌘+⌘+E	Restart
⌘+Q	Log Out/Exit Alexandria
⌘+Z	Undo
⌘+⌘+Z	Redo
⌘+X	Cut
⌘+C	Copy
⌘+V	Paste
⌘+A	Select All
⌘+F	Find
⌘+G	Find Again
⌘+;	Preferences
⌘+L	Patrons
⌘+I	Items
⌘+T	Circulation
⌘+K	Search

# Circulation Commands

## Circulation Commands

Here is a helpful list of Circulation command shortcuts. For detailed information on how to use each command, please refer to the **Circulation** chapter on page 227.

*	Import Script/File
. (date)	Set Override Due Date.
.	Clear Override Due Date.
..	Clear Transaction Window. Sets Check In/Out Mode.
+++	Print Transaction Log.
# (comment)	Places a comment in the Transaction Log.
/ (old barcode=new barcode)	Change Patron / Item barcode.
b (item barcode)	Bookdrop an item.
d	Print Transaction.
o (item barcode) (current patron required)	Overnight Checkout.
q (patron/item status)	Patron/Item Status.
x	Clear current Mode. Resets to Check In/Out Mode. Make Patron or Item Current.
x (item barcode)	Make Item Current.
x (patron barcode)	Make Patron Current.
y	Start Statistics Mode.
z	Clear Transaction Log.

## Circulation Modes

g (current patron required)	Reservation Mode.
gg	Item Reservation Checkout Mode.
gp (current item required)	Patron Reservation Mode.
gpp	Patron Reservations Checkout Mode.
h (current patron required)	Hold Mode.
j (current patron required)	Reserve Mode.
as	Self-service Checkout Mode.
asb	Self-service Bookdrop Mode.
b	Bookdrop Mode.
i	Inventory Mode.
ib (date is optional)	Inventory Bookdrop Mode.
x	Clear Current Mode. Resets to Check In/Out Mode. Make Patron or Item Current.

## Reserves, Reservations, Holds, and Renew Commands

g (item barcode) (current patron required)	Place reservation.
gg (item barcode)	Reservation checkout by item.
gp (patron barcode)	Reservation by patron.
gpp (patron barcode)	Reservation checkout by patron.
h (item barcode) (current patron required)	Place a hold request on an item.
qe (patron required)	Renew patron items from list.
ra (patron barcode) or (current patron required)	Renew all items for patron.
j (current patron required)	Mark Reserved Mode.
r (item barcode)	Renew Item Mode.

## Find Commands

c (call number optional)	Find item by call number.
l (patron name optional)	Locate patron.
t (title optional)	Find item by title.

## Patron Commands

+	Show patron note.
+ (comment)	Append patron note.
+#	Clears a patron note.
+# text	Replaces a patron note.
f (current patron required)	Opens Charges tab in Circulation window.
f (charge amount) (description) (current patron required)	Charges a fee to a patron.
ff (current patron required)	Opens Payments tab in Circulation window.
p (patron required)	Set Current Patron.
q (patron barcode) or (current patron required)	Display patron details.
qe (patron barcode) or (current patron required)	Opens Renew All window.
ra (patron barcode) or (current patron required)	Renew All Items.
/ (old barcode) = (new barcode)	Change barcode (item or patron).

## Item Commands

++	Show item notes.
++ (comment)	Append item notes.
++#	Clears a general note.
++# (comment)	Replaces an item note.
e (subscription code optional)	Receive subscription.
h (item barcode) (current patron required)	Places a hold on an item.
k (item barcode)	Recall item.
kp (item barcode)	Recall item with printed letter.
km (item barcode)	Recall item with email notification.
q (item barcode)	Display item details.
r (item barcode)	Renew item.
/ (old barcode) = (new barcode)	Change barcode (item or patron).

## Change Information Modes

nc (location required)	Change Copy Location Mode.
nd (location required)	Change Copy Sublocation Mode.
np (location required)	Change Patron Location Mode.
v (classification required)	Classification Mode. Catalog Items / Assign Keywords.
no (collection required)	Set Change Copy Collection Mode.
up	Set Change Patron Policy Mode.
ui	Set Change Item Policy Mode.
ur	Set Restore Policy Mode (item or patron).
m	Issue Routing slip.
x	Clear Current Mode. Resets to Check In/Out Mode. Make Patron or Item Current.

## System Patrons

1	Lost Item Patron.
2	Discarded Patron.
3	For Library Use Patron.
4	On Repair Patron.
5	On Order Patron.
6	Archived Patron.
8	Unknown Status Patron.

# Glossary

**Alexandria Data Station**—The Alexandria program that performs the processing and permits access to the data. Includes the ability to circulate, import, export, manage patrons, manage items (catalog), search, run reports, and perform certain maintenance functions (this is the server program and doesn't necessarily require server hardware).

**Alexandria Librarian**—The Alexandria program for additional circulation and cataloguing stations. Includes the ability to circulate, import, export, manage patrons, manage items (catalog), search, and run reports. Only some maintenance and database-related functions are available on this program whereas all maintenance and database-related functions are available on the Data Station. This is a client program and doesn't actually have direct access to the data, but it does make processing requests of the Alexandria Data Station.

**Alexandria Researcher**—The Alexandria program for patron OPACs (on-line public access catalog) or Search catalogues. (This is a client program and doesn't actually have direct access to the data. It makes processing requests of the Alexandria Data Station).

**ASCII**—American Standard Code for Information Interchange - a universal, encoding system for text characters.

**Attachments**—Electronic files or documents that appear on the patron or item record where they are attached. These attachments can be accessed from the **Patron** or **Item Details** windows from **Circulation**, management, or **SEARCH** windows. Attachment descriptions for items are keyworded and searchable from **Search** or the **Alexandria Researcher**.

**Bookdrop**—Circulation mode for checking in books.

**Boolean Logic**—Named after George Boole. A logical, combinatorial system treating variables, such as propositions and computer logic elements, through the operators AND, OR, AND NOT, and THROUGH. This logic can have one of two values, true or false.

**Bulletin Board**—A message-display center within Alexandria. Messages can be viewed from any Alexandria program but can only be added from the Data Station or Librarian programs.

**CDR**—Compact disc-recordable. A compact disc on which you can write only once and thereafter is read-only.

**CDRW**—Compact disc-re-writable. A compact disc on which you can write and read from several times.

**Check In/Out**—Circulation mode for checking out or checking in books. Rules that apply are 1) if current patron doesn't currently have the copy checked out and the copy is available, check it out to the current patron; 2) if the current patron doesn't currently have the copy and the copy is checked out to someone else, ask the user if the copy should be checked in - if yes, then try checking it out to the current patron; or 3) if the current patron has the copy already checked out, check the book in. What this mode does, as has been shown, depends on the conditions above.

**Data**—Numerical or other information represented in a form suitable for processing by computer.

**Details**—Additional status information about the patron or item that can be accessed.

**Discarded Items**—A special patron (barcode 2) that will change the status of an item to discarded. When an item is damaged, weeded or discarded and must be flagged for reports or removal, just check out the item to the Discarded Items patron.

**Drop-down Menu**—A menu in a graphical user interface, whose title is normally visible but whose contents are revealed only when the user activates it, normally by pressing the mouse button while the pointer is over the title, whereupon the menu items appear below the title. The user may then select an item from the menu or click elsewhere, in either case, the menu contents are hidden again. A menu item is selected either by dragging the mouse from the menu title to the item and releasing or by clicking the title and then the item. When a drop-down menu is located in the main area of a window, as opposed to the menu bar, it may have a small, downward-pointing triangle to the right.

**Hold**—Also known as a pending hold. Use this when all copies are checked out and someone wants any copy of that item as soon as one is available.

**HTTP**—Hypertext Transfer Protocol. The WWW page prefix indicating the clickable “hotlink” arrangement used to instantly take you to a different page. A protocol used to request and transmit files, especially webpages and webpage components, over the Internet or other computer network.

**In-Stock Hold**—A hold that has been filled and is awaiting pick up by the patron indicated. Notices do not currently print automatically but can be printed from the Circulation Reports.

**Inventory**—Circulation mode that date stamps the copy within Alexandria with the last time that the copy was seen by the system. In addition, inventory will indicate when the copy is out of shelf order by placing “??->” next to the transaction log entry. NOTE: Alexandria will change the inventory date every time the copy is checked in or checked out since that was the last time the copy was seen by the system.

**Inventory/Bookdrop**—Circulation mode that performs the standard functions of inventory and will check in any copies with a status of checked out, lost, archived, or discarded. If you do not want the status of the item to change, then use the Inventory mode instead.

**ISBN**—International Standard Book Number.

**Item**—Any book, video, cassette, VCR, or Electronic document or file that is cataloged in Alexandria.

**LCCN**—Library of Congress Card (Catalog) Number.

**Links**—A built-in launcher for electronic files or documents.

**Lost Items**—A special patron (barcode 1) that will change the status of an item to lost. When an item is lost from inventory or by a patron, just check out the item to the Lost Items patron.

**MARC**—Machine-readable cataloguing.

**Patron** —A library user.

**PPP**—Point to point protocol. A protocol used by TCP/IP routers and PC's to send packets over dial-up and leased connections.

**Sequence Number**—An internal accession number for patrons, items and copies. Shown in Patron, Item and Copy management as a small black number in the upper right of the screen. A unique identifier assigned to every patron, item and copy added to the system. It can be reassigned by the system but not by the user.



**Reservation**—A transaction that pre-checks out a specific copy for a very specific date range. Can be used to school units where the books need to be in the library between certain dates and cannot be checked out. Only the person with the reservation can check out the copy. If the person with the reservation doesn't check out the copy, it will return to an available status.

**SMTP**—Simple Mail Transfer Protocol.

**Special Patrons**—Alexandria-defined patrons that perform certain tracking tasks and functions. i.e. Lost Items, Discarded Items, On-Order Items, On Repair Items, Archived Items.

**Symbology**—The study or interpretation of symbols or symbolism. In the case of Alexandria, the barcode symbology studies the barcode symbols.

**TCP/IP**—Transmission control protocol/internet protocol. A communication between computers, used as a standard for transmitting data over networks and as the basis for standard Internet protocols.

**Temporary Items**—An item barcode that only exists while it is checked out. As soon as the item is checked in it is removed from the system. Temporary items are only visible in circulation reports or on the patron's record. They are not catalogued or searchable. They cannot be inventoried. Use these barcodes for items that circulate infrequently or for Inter-Library Loan. See Circulation Preferences for directions on setting up a range of barcodes for temporary items. See Circulation Basics for creating a temporary item while in Check In / Out mode.

**UPC**—Universal Product Code. A number and barcode that identify an individual consumer product.

**URL**—Uniform Resource Locator. An internet address, usually consisting of the access protocol (http), the domain name (www.goalexandria.com), and optionally the path to a file or resource residing on that server (trade).

**WWW**—World Wide Web. All of the users and resources on the internet that are using HTTP.

**Windows**—A list of all currently open windows in the Alexandria program. A fast way to switch between a search window, search results, a research list, and a results list without having to close or minimize the previous screen.

**Z39.50**—Information retrieval service definition and protocol specification for library applications, officially known as ANSI/NISO Z39.50-1992, and ANSI/NISO Z39.50-1995. This standard, used by WAIS, specifies an OSI application layer service to allow an application on one computer to query a database on another. Z39.50 is used in libraries and for searching some databases on the Internet. The US Library of Congress is the official maintenance agency for Z39.50.



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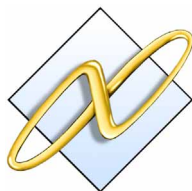
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